# How Mobile Forms Transform Businesses, Backyards & Lives

THE PROOF IS IN THEIR STORIES

Introduction

Businesses today often have an increasing need to enable workers in the field to collect data while outside of the office. Many companies, like construction and utility companies, employ a mobility strategy that equips these field workers with tablets and smartphones. Mobile forms help those workers utilize their devices to collect and submit data in real-time. That data can be instantly shared with the main office, or input into another business system or workflow.
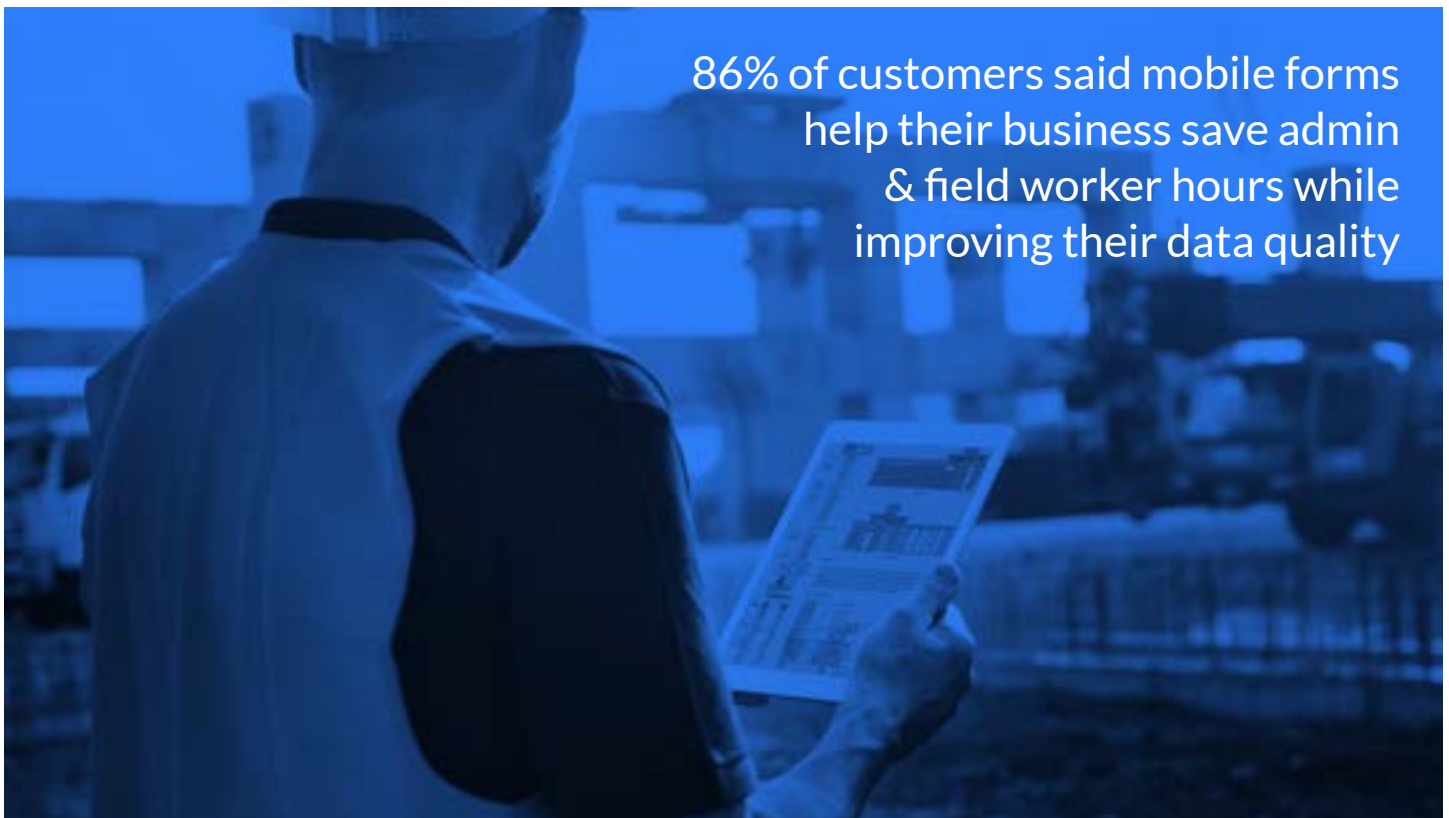
86% of customers said mobile forms help their business save admin & field worker hours while improving their data quality

What are Mobile Forms?

Mobile forms are applications designed for smartphones and tablets that allow for the creation and submission of forms with multiple types of data. In most cases, mobile forms help companies with employees in the field streamline their data collection. Mobile forms present a way for companies to fill and submit traditional paper forms like reports, audits, or inspections on mobile devices.
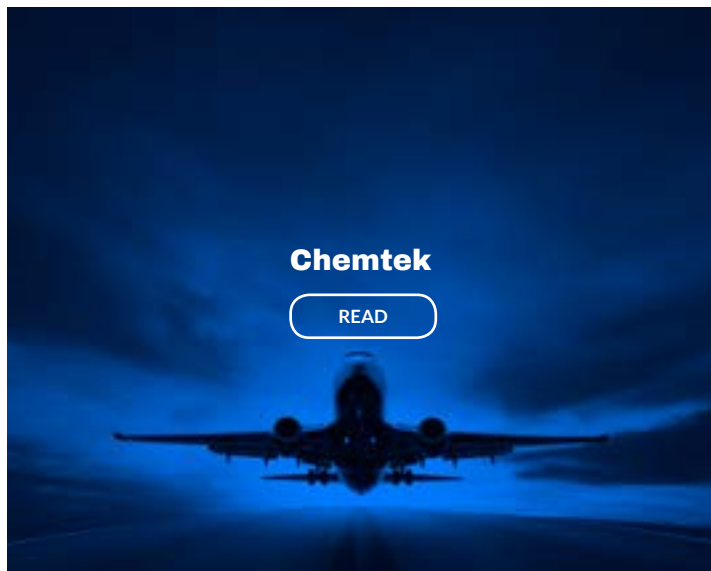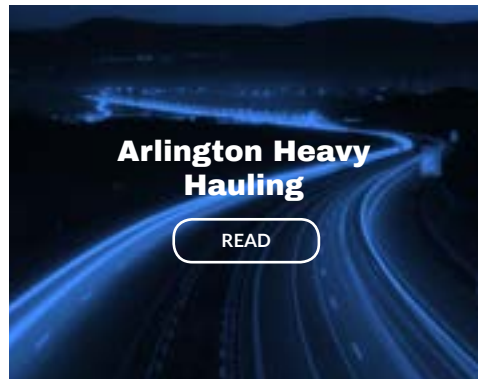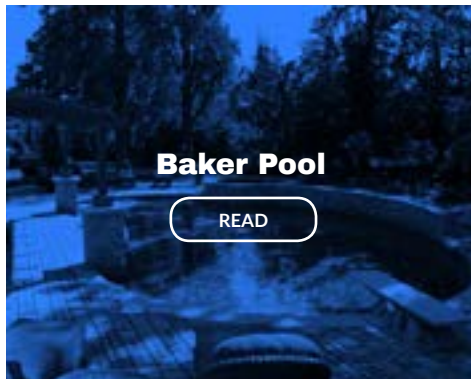
For example, when work is completed on a jobsite outside of the office, requests will be made for parts, materials and supplies. When a request has been submitted through a mobile forms app, a Purchase Order can be created automatically. That way, employees can continue working and don't need to wait for the accounting department to get back to them with a PO.

Customer Success Stories

How real businesses have found success with mobile forms

Getting access to data 3-5 days sooner, saving 10 hours of administrative time each week, improving data quality and accuracy, automating workflows by eliminating paper processes; these are all ways mobile forms can improve how your business operates.

Read how these businesses are using Device Magic mobile forms to collect data around the world, complete mandatory forms while out on the road, even with unreliable cell connections, access data from the field in real-time, complete the billing process more quickly, and better track project progress to meet customer deadlines.

International Committee of the Red Cross

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International Committee of the Red Cross

Introduction

Since its creation in 1863, the ICRC's sole objective has been to ensure protection and assistance for victims of armed conflict and strife. It does so through its direct action around the world, as well as by encouraging the development of international humanitarian law (IHL) and promoting respect for it by governments and all weapon bearers.

The International Committee of the Red Cross Economic Security Unit, which manages the design, implementation and monitoring of aid assistance programs, has deployed Device Magic mobile forms to assist with data collection and analysis in the field around the world.

The Economic Security Unit provides assistance to victims of armed conflict and violence, including both civilians and people deprived of freedom. The EcoSec Unit conducts assessments to determine what people need to be able to cover their essential needs of food, shelter, clothing and hygiene in a sustainable manner. EcoSec addresses any gaps in an ability to cover essential needs through their assistance programs.

Data from the EcoSec assessments collected in the field is sent back to a central office location to be reviewed by stakeholders. Device Magic is fully functional in remote locations where there is no cellular or Internet connection. With the help of the data being collected with Device Magic, ICRC is able to evaluate the effectiveness of their assistance programs and make sure that beneficiaries are receiving the necessary resources.

"We needed an intuitive and versatile data collection solution, respecting ICRC's rules on the protection of personal data. Device Magic was able to carry out a secure server deployment at our Swiss data center, tailored to our particular needs," said Daniel Fueger, Deputy Head of the Economic Security Unit.

"We really believe in ICRC's mission and are proud to be able to work with this kind of organization. It is very rewarding to serve them in their critical mission and to see how the collected data is directly impacting people's lives," said Dusan Babich, CEO and co-founder of Device Magic.

CUSTOMER SUCCESS STORY

Baker Pool

Introduction

Baker Pool provides new pool installations and pool maintenance services for the mid-West. The company understood the value of switching to paperless processes and having digital operations for their pool maintenance visits, so they set the goal to go completely paperless for their service technicians. With Device Magic's mobile forms solution, Baker Pool was able to achieve its paperless goal and optimize their pool maintenance processes.

"When we were deciding on a new forms solution, the Dispatch feature of Device Magic was exactly what we were looking for."

- PATRICK MCCORMICK | PRESIDENT

Filling a Software Gap for Field Data Collection

Every spring, Baker Pool opens about 600 pools and completes weekly pool maintenance and repairs throughout the season in the Greater St. Louis area. Although the company had a software that met most of their operations needs for scheduling and billing, they needed a solution for collecting the information gathered by service techs and to provide access to the historical data while a tech is onsite.

Patrick McCormick, President of Baker Pool, struggled with another mobile forms provider to get forms built and deployed. After months of waiting on the forms to be built by the vendor, it became imperative that a solution was put in place prior to the busy summer season.

McCormick found Device Magic, and within two weeks had completed a product trial, built all of the forms himself that his service techs would use, and was able to deploy mobile forms with the service team on about 20 devices.

Weekly Maintenance Data Collection

Baker Pool service techs use Device Magic for data collection during weekly pool maintenance visits throughout the summer. During each maintenance visit, techs monitor the condition of the pool. This includes taking six different water chemistry readings.

These readings create a pH history of the pool water that can be referred back to should a problem arise. Previously, these readings were collected on a paper form and needed to be scanned into a computer at the office.

Now with Device Magic, the weekly maintenance form is always available on a tech's mobile device and can be easily completed for each visit. And if a problem appears with the pool, historical data is available to track when the issue began.

Baker Pool collects between 20-30 submissions per pool each season with Device Magic. The data is then used to create an overview record of the pool for that year. Device Magic ensures that all of the necessary data is accurately collected and recorded.

Tracking New Pool Maintenance

"When we were deciding on a new forms solution, the Dispatch feature of Device Magic was exactly what we were looking for," said McCormick. This feature is especially helpful after the construction of a new pool.

When a new pool is first installed, techs go out twice a week during the first 30 days to perform maintenance and check in. A checklist must be completed for each of these visits.

With Device Magic, the tech fills out the checklist during their visit and uses it on the next visit to see exactly what was done previously. Sometimes a different tech will perform one of the weekly visits. In that case, they can pull up a Dispatch of the form that was begun earlier in the week and know exactly where to start.

Dispatches sent to techs live on their tablets and can be accessed at any time, instead of being stored back in the office or somewhere else less accessible.

Giving Supervisors Access to Important Data

Baker Pool field supervisors use Device Magic to help keep track of the work their team is doing. If an issue arises with either an employee or a pool, managers can easily check the data to determine if this is a one time issue, or a chronic problem.

Having this data readily available enables faster troubleshooting and the ability to address problems more quickly.

Baker Pool knew that paper wasn't an efficient part of their workflows, and understood the value of having access to data from the field in real-time. Device Magic makes managing work during their busiest season easy. After a fast initial implementation, Baker Pool has expanded their forms to include pool openings and closings and winter maintenance, along with weekly maintenance.

Arlington Heavy Hauling

Introduction

Arlington Heavy Hauling is one of the largest specialized haulers in the Southeast. With over 40 years of experience, their expertise is the movement of large, oversized machinery and construction equipment.

Before Mobile Forms

Gary Ayers, Vice President, says Arlington Heavy Hauling "used an antiquated system" before making the switch to Device Magic. This system had no graphical interface and it required drivers to complete forms while they were on the road. There were five different forms that needed to be completed for each load and this system failed to meet the demands of their business. To improve efficiency they would need to find another way.

Getting Started

As Ayers looked for solutions to the problem that Arlington Heavy Hauling was facing, Device Magic was an obvious choice. The company decided to provide devices for their drivers and began the process of transitioning to paperless forms using the new tablets.

Using Device Magic's drag-and-drop online form builder, Ayers and his team built a form that his drivers could complete from the road, with or without an Internet or cellular connection. After downloading the Device Magic app on their tablets, drivers could now complete this form, which included photos, timestamp and GPS data, and send it back to the office instantly.

Ayers says, "It took me about a week to be comfortable with it." Now he is so comfortable with the system that he has begun creating surveys to bring data from his drivers into dispatch meetings. With Device Magic, Ayers can quickly develop, deploy, and analyze survey data.

Advantages

Arlington Heavy Hauling has experienced many advantages since going paperless, including improving efficiency and accuracy, as well as saving on costs.

Efficiency

Having the ability to accurately track every stage of a haul allows dispatchers to relay detailed information to the customer. This means customers are more satisfied with the service and dispatchers spend less time tracking down information about a haul. Every form and photo uploaded into the system by a driver includes a timestamp and GPS data. Dispatchers can use this

information to track a haul or send assistance in the event of a flat tire or other emergency. "[Drivers] can upload a blown tire, for example, and we can utilize the GPS to get them help," Ayers said. This helps to keep drivers safe and speeds up the whole maintenance request.

"Device Magic has streamlined communication, which translates to saved time, and money."

- **GARY AYERS | VICE PRESIDENT**

Accuracy

Arlington Heavy Hauling can now monitor every stage of the process from checking the haul through delivery, to seeing it out for transfer. This information makes the whole delivery more efficient. However, it also increases accuracy by providing data to analyze deliveries. Time stamps and GPS data can be loaded into a table to calculate the efficiency of different routes and drivers. It is now very easy to see if a delivery is off schedule and the problem can be addressed in advance.

Cost Savings

Real-time data collection has helped Arlington Heavy Hauling to improve processes by getting information sent to the right people without delays. "[Device Magic] has tremendously streamlined communication, which translates to saved time, and probably money," said Ayers.
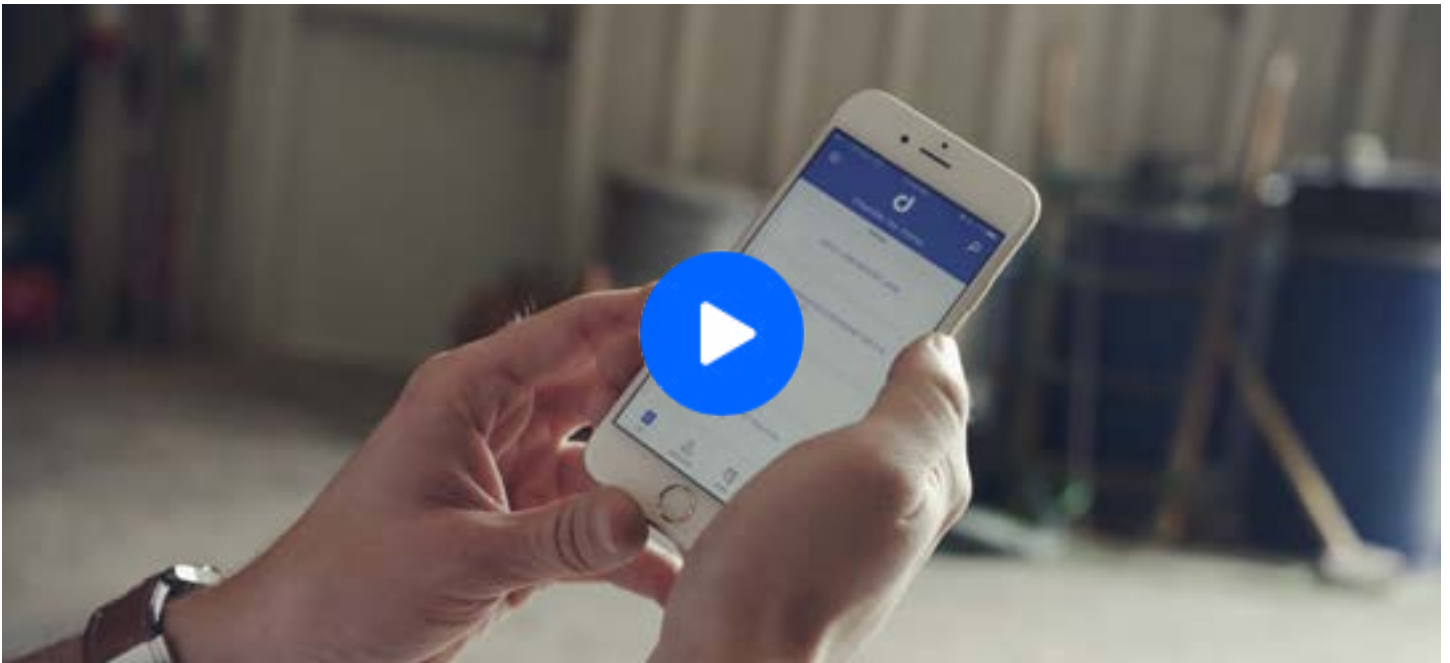
CUSTOMER SUCCESS STORY

Chemtek

Introduction

Located in North Carolina, Chemtek is a manufacturer, distributor, and contractor with sales in over 30 countries. They have made air travel safer through their research and innovation, as well as committing to environmental responsibility in the development of products, procedures, and services.

Chemtek's process of on-site data collection and ability to keep track of progress on jobs was challenging, resulting in fewer updates for their customers and slower billing. With Device Magic, Chemtek established a consistent process for data collection and managing progress on jobs - saving hundreds of administrative hours and completing customer jobs faster.

Mobile forms allow Chemtek to get information from the field or job site, keep track of inventory, and billing essentials in real-time. Managers can make adjustments to schedules and understand what stage a project is in at all times, making sure that project requirements and deadlines are met.

Chemtek has been able to collect data more efficiently and ultimately save time by using mobile forms. "Before it took months to get information back. Now we're getting it within weeks, if not days," said Chandler Alm, Senior Accountant at Chemtek. Chemtek has been able to start doing progress billings during a project, instead of waiting until a job is completed to retroactively determine invoicing.

Data continues to flow even after business hours. Technicians are able to submit purchase requests via the Device Magic mobile app and a PO number is returned automatically - eliminating the need to wait for a next-day response from accounting. This keeps projects moving forward and allows them to be completed faster and on schedule.

CUSTOMER SUCCESS STORY

African Clean Energy

Introduction

African Clean Energy (ACE) developed the ACE 1, a cookstove that produces virtually no smoke and can burn a variety of biomass fuels. The stove also has a USB port and solar panel, and the generated solar energy can be used to charge phones and provide LED lighting.

The ACE 1 is not only one of the highest tech stoves available, it is also extremely efficient and safe. ACE provides a fully integrated chain of manufacturing, sales and after sales care and maintenance in Lesotho, Uganda, and Cambodia.

"We're able to gather our own data now and learn from it, which is invaluable. We can manage data collection ourselves."

- JUDITH WALKER | DIRECTOR OF OPERATIONS

Three billion people worldwide still cook on open fire, requiring huge amounts of wood, charcoal and other biomass fuels. But these types of inefficient cooking methods have disastrous effects on health and lead to environmental degradation. Indoor air pollution and related health problems result in nearly 4 million deaths each year, primarily affecting women and children.

66% of the population of sub-Saharan Africa does not have modern energy. African Clean Energy's mission is to provide off-grid household energy solutions to people in Sub-Saharan Africa and elsewhere in the developing world.

A common misconception Judith Walker, ACE's director of operations, encounters is that people in the developing world are unwilling or unable to pay for high quality products, and that the latest technology can't be used in these markets.

However, ACE has been able to create a product that has major significance for the lives of their customers by using the best possible technology and finding ways to be more efficient. Providing the highest quality product possible has always been part of their goal. "Our main focus is on the customer," Walker said.

"If you're able to apply the tech that's available you're able to help people so much more," Walker said.

ACE uses Device Magic mobile forms to operate more efficiently as they conduct data collection, manage the supply chain and maintenance work, and complete the sales process with their customers in remote areas of the developing world.

Improving the Sales Process

ACE has in-house sales teams in Lesotho, Uganda, and Cambodia, who travel around remote areas to demonstrate and sell the ACE 1 stove. This type of a sales process is generally very paper heavy, lengthy, slow moving, and expensive, said Walker.

By using mobile forms instead, the sales team is able to collect data and complete their sales process more efficiently than they did when using paper. Sales forms are completed faster, more accurately, and don't run the risk of being lost on the road.

Remote Data Collection

With the majority of her team in Lesotho, Walker, who is based in Amsterdam, didn't have a fast way to get data and information back from them, if she received it at all. Without having access to this data from her sales and manufacturing teams, Walker

was unable to process or learn from it to find ways to improve operations.

Mobile forms ensured that all of the necessary information was being collected and sent back to Walker's office in real-time. "Being on site is vital for data collection, otherwise people make stuff up, or forget to ask a question," Walker said. Walker even uses geo-tagging to see exactly where a question was answered.

Another challenge was access to cell and Internet coverage. In the rural locations where ACE works, cell coverage is "spotty at best," said Walker. "Being able to work offline and collect GPS locations is vital."

Data Collection for Research

Taking advantage of technology allows ACE to reach their customers in remote areas, while simultaneously completing data collection and research efforts.

ACE uses Device Magic to collect data on the baseline in which customers live. This data includes household size, where they are located, how much is being spent on energy, as well as how else money is spent.

Often research about these areas is limited or outdated. "We're able to gather our own data now and learn from it, which is invaluable. We can manage data collection ourselves," Walker said, instead of relying on outside research organizations. "All you need is a smartphone and an app and that's it," Walker said.

ACE has built up a database of 6,000-7,000 of

their customers, and are able to share the results and data they have collected to help others in the industry.

Energy Expense Surveys

Energy poverty, where over 25% of income is spent on fuel, is a major problem across Cambodia, Lesotho, and Uganda, and 70% of the population in these countries doesn't have access to energy.

The ACE 1 costs $100, which is a high upfront cost for people in these developing countries. The ACE sales team conducts an energy expense survey using Device Magic with potential customers prior to a purchase. This survey tracks how energy is being used by the customer and how the money spent on energy could be used more effectively.

One common expense is charging cell phones. Although the majority of ACE's customers don't have access to electricity in their homes, they sometimes have access to it in nearby towns, where it can be very expensive. People will often pay around .70 cents to charge their phone, and with several charges needed each week, this expense can add up to $5-6 per month.

Using calculated questions on the survey form, ACE sales can show the customer what they would save by purchasing the ACE 1 based on the answers they've given. Collecting this data through mobile forms allows customers to understand immediately what they're spending on energy and how they would be able to afford the ACE 1.

The ACE 1 reduces the amount of fuel needed by

70% compared to open fire, resulting in a 50% savings in fuel costs compared to a charcoal stove. ACE has seen an 81% reduction in energy expenses in Lesotho by using the ACE 1. This enables customers to afford to pay for the product with the money they are saving on fuel and energy. ACE works with KIVA to crowdsource funding that allows customers to purchase the stove on credit and pay it back as they save.

This is also why completing data collection with mobile forms is so important. "It means we can see where the process is working and where it isn't, and why. Why aren't they [customers] saving enough money to pay for it [the ACE 1]," Walker said.

Managing the Supply Chain

The ACE 1 is manufactured and distributed directly to customers from ACE's factory in Lesotho. ACE uses Device Magic to complete reports and manage the supply chain more accurately.

By using Device Magic, ACE can better track when components arrive and leave the warehouse. ACE also provides maintenance for customers. With the Device Magic form used for maintenance, Walker can track what component was replaced and make sure it matches what actually left the warehouse. This data also needs to be recorded and matched with payment records in Salesforce.

Saving on Costs with Technology

"We're always looking for ways technology can help us to be more efficient," Walker said.

Walker loved how easy Device Magic was to use and set up, without needing a big tech team. "It was so easy for me to get started," she said. The drag and drop form builder in particular just "makes sense."

By using Device Magic, "I could keep the process much leaner," Walker said. Taking advantage of technology allows ACE to provide a higher quality product, while keeping the cost down for their customers and giving them the best possible solution available.

Just the Facts

All of these businesses have found the value of replacing paperwork with mobile forms to access data sooner, operate more efficiently, and keep costs down. By eliminating paperwork and using mobile forms instead, your business will:

- Save hundreds of administrative hours & thousands of dollars each year. Field crews save around 11 hours per week.
- Know when your tech arrives on-site or completes a form with geo-location and time stamped forms.
- Invoice for jobs twice as quickly when using our mobile forms solution.
- Improve compliance by 30%.

- Reduce return trips due to incomplete data and forms by 50%.
- Speed of response to customers, suppliers, or staff has been improved by 10x or more following an investment in mobile forms.
- Stop wasting time finding a computer, fax or scanner. Start sending data in real-time right on the job site with your mobile devices.
- See an average 33% boost in productivity with paperless workflows.

Interested in learning more about the benefits of mobile forms?

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