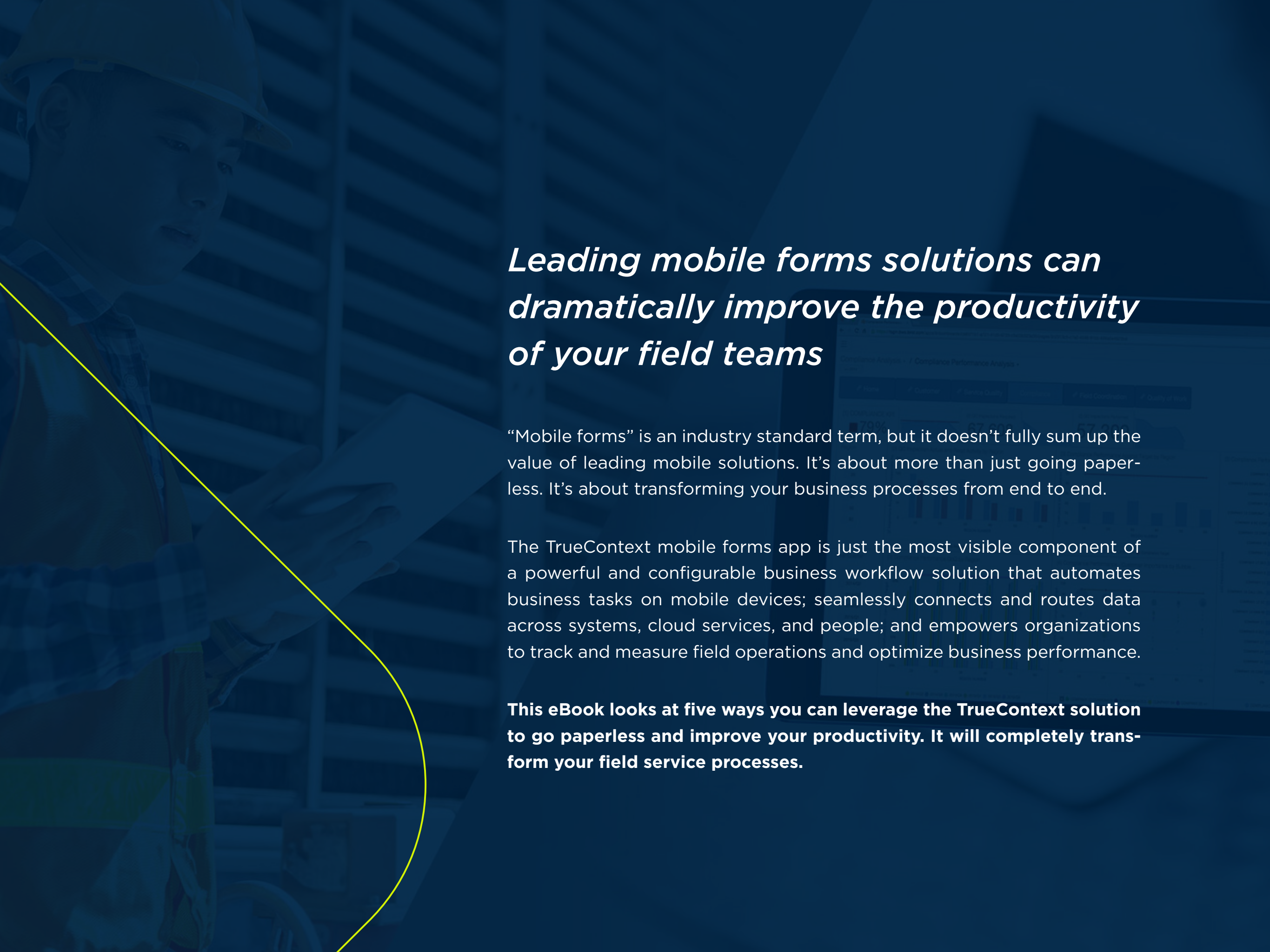


EBOOK

Productivity is Paperless

Top 5 ways mobile forms connect your field teams to the office





Leading mobile forms solutions can dramatically improve the productivity of your field teams

“Mobile forms” is an industry standard term, but it doesn’t fully sum up the value of leading mobile solutions. It’s about more than just going paperless. It’s about transforming your business processes from end to end.

The TrueContext mobile forms app is just the most visible component of a powerful and configurable business workflow solution that automates business tasks on mobile devices; seamlessly connects and routes data across systems, cloud services, and people; and empowers organizations to track and measure field operations and optimize business performance.

This eBook looks at five ways you can leverage the TrueContext solution to go paperless and improve your productivity. It will completely transform your field service processes.

7

Collect rich & accurate data directly in the form

- Collect media-rich field data, such as photos, sketches, audio recordings, time & GPS stamps, and barcodes, and embed all data directly in the form.
- Streamline data collection and prevent entry errors with a user-friendly interface designed specifically for field users, running on the OS of your choice.
- Leverage TrueContext's structured data to quickly build mobile forms that offer advanced features like conditional logic and repeatable sections.

Mobile device capabilities and a best-in-class user experience help you collect data you never could before.



Form Diagram

Build configurable workflows to expedite data sharing

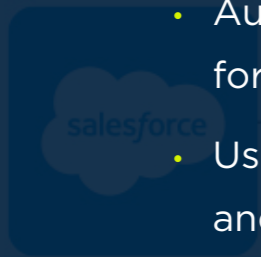
Sources Fields Document Templates Destinations



Technician Labor Rates (Box)

Configure workflows that automatically dispatch new and updated mobile forms to field workers, and, when completed, send data and reports to other stakeholders.

Email Destination



Automatically route collected data in real time to the right recipient(s) and systems in the form of re-usable data and/or documents.



Use any combination of TrueContext open APIs, pre-configured cloud service connections, and commonly used protocols to quickly and easily integrate with virtually any business and/or analytics system.

Box Destination

Salesforce Data Source

Universal Work Order

Automated mobile workflows maximize the value of the data your field teams collect and minimizes time wasted on manual processes.



Salesforce Destination

Groups



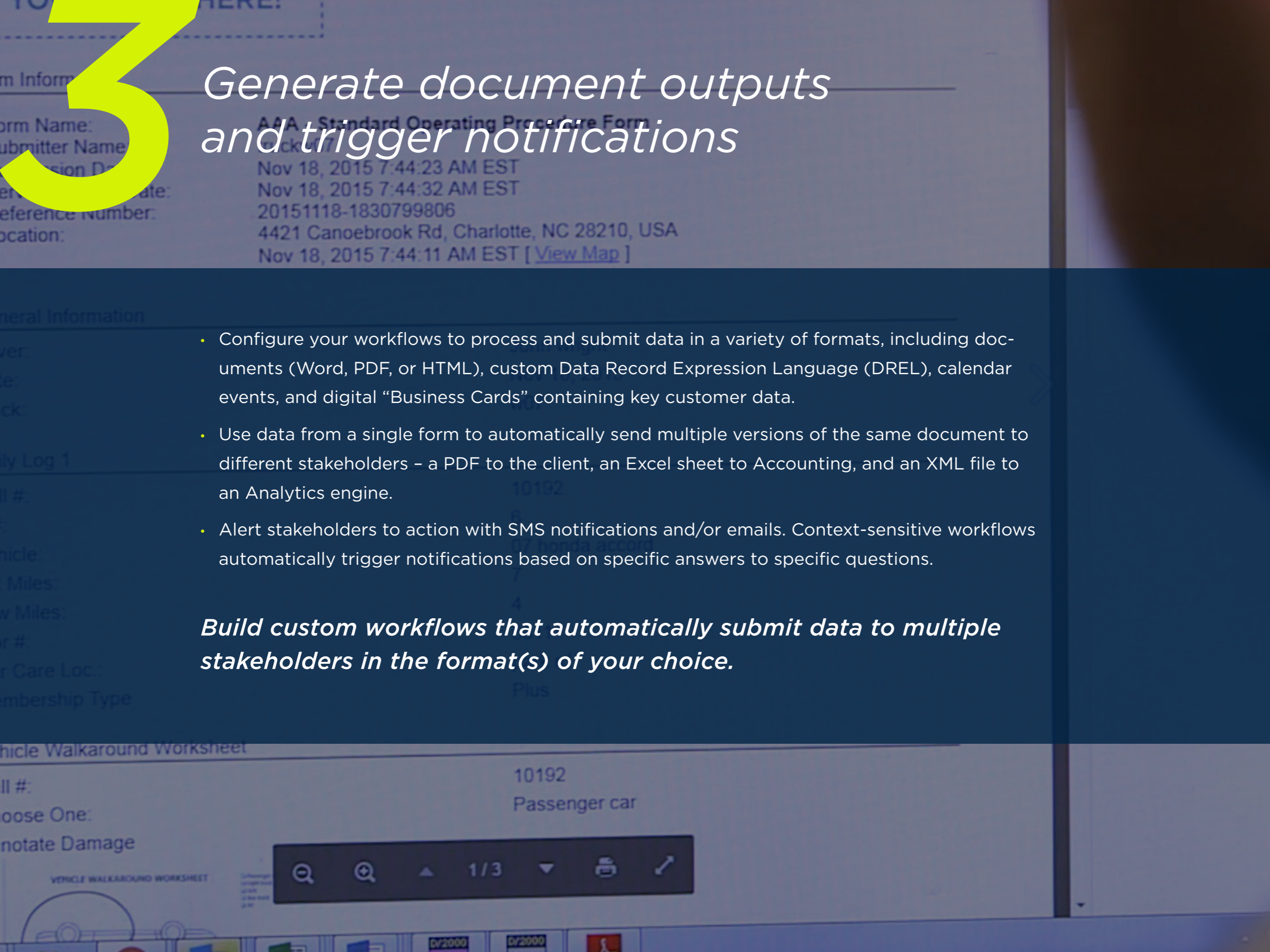
Demo Group

3

Generate document outputs and trigger notifications

- Configure your workflows to process and submit data in a variety of formats, including documents (Word, PDF, or HTML), custom Data Record Expression Language (DREL), calendar events, and digital “Business Cards” containing key customer data.
- Use data from a single form to automatically send multiple versions of the same document to different stakeholders – a PDF to the client, an Excel sheet to Accounting, and an XML file to an Analytics engine.
- Alert stakeholders to action with SMS notifications and/or emails. Context-sensitive workflows automatically trigger notifications based on specific answers to specific questions.

Build custom workflows that automatically submit data to multiple stakeholders in the format(s) of your choice.



4

Provide field teams with up-to-date information

- Leverage dispatching and cloud-connected data sources to provide field workers with the most up-to-date information in form dropdown menus (such as asset lists, parts lists, price lists, and CRM data).
- Edit the data source, e.g. update a parts list, at the office and the system will automatically show the updated record on all devices in the field.
- Configure your workflows to update your CRM system when a field worker submits a form after a customer visit. The next time a rep visits the customer, the forms automatically include the most up-to-date customer information.

Field teams no longer need to return to the office to get the most recent data. Even the most demanding enterprise clients can rely on having up-to-date product and customer information within their mobile forms

5

Track field performance & compliance

- Easily integrate your mobile solution with virtually any analytics system – including TrueContext's own.
- Correlate, aggregate, and drill down into your form data to uncover patterns and statistically meaningful correlations. Respond to business process challenges and opportunities faster.
- Create powerful executive reports and dashboards which can be automatically emailed to company executives, business partners, or customers.

You can't manage what you don't track. Make better business decisions using an Analytics & Reporting engine and increase profitability.



See TrueContext in action

[BOOK YOUR DEMO](#)