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# First Look: Mobile Process Automation Made Easy with doForms

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## Summary

- doForms is aimed at the sweet spot of mobility: easy to create custom mobile applications
- doForms uses the metaphor of paper forms to create a web-based environment for business users
- doForms can integrate with server-side business applications through APIs
- doForms can support a variety of use cases for improving mobility
- doForms costs \$9.95 per user per device per month or \$14.95 with the dispatching application

How is your organization going to harness the power of mobile devices? In many ways, the answer to this question is a proxy for your approach to technology in general. To many companies, the power of mobile devices is exploited by buying mobile applications that extend business applications. Other companies develop custom mobile apps from scratch using advanced technology. Both approaches are valid, but have their drawbacks.

If you rely on mobile apps to expand the reach of your existing suite of business applications, you certainly will get some benefits as those applications become usable anywhere. Custom apps are expensive to develop but can provide the perfect solution for a high-value use case. But few companies can build more than one or two such apps a year. What about the rest of the processes? How are they going to benefit from the power of mobility?



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The biggest wins will come from addressing the sweet spot not tackled by mobile apps or custom apps: quickly making a business process mobile. It should also be inexpensive, enable experimentation, and not require developers to create it, while at the same time enabling the creation of mobile applications that can communicate with the rest of the systems in a business. This is the sweet spot that doForms is after, one of a handful of companies that is focused on expanding the power of mobile devices.

## What doForms Does

doForms is aimed squarely at this sweet spot. The mission of doForms is to provide a platform so that any department in a company can quickly create a mobile application. doForms uses the metaphor of the paper form as a way to make it easy to create such applications. The web-based development environment allows users to drag, drop, and configure fields on a blank page. The fields can be filled in with device data, such as geolocation, images, and video captured from the devices. The fields can also be connected so that:

- Inputs determine if fields appear or not
- Data quality rules are enforced across fields
- Fields from one form can show up or influence what happens on another form

doForms applications can operate either in connected or disconnected mode. When in connected mode, doForms can communicate with a server layer of technology that can access data from other business applications. In this way, forms can be filled in with information from an ERP, finance, or CRM system. The communication can go both ways. When a form is completed and submitted, the information can also flow back to the business systems. This sort of integration requires work from programmers who understand the needed integration technology.

doForms also supports simple workflows. When a form is completed, it can be submitted back to the server, which can then assign the form to the next user in the workflow. To support fleets of mobile workers, doForms has a server-based dispatching application.

doForms is simple to use but doesn't take the form metaphor too far. Some of the competitors in this space don't allow much communication between different pages of a form or attempt to provide a set of standardized forms. doForms avoids the limitations of such approaches, creating a forms-based development environment that allows support for a wide variety of devices.

Think of it this way: when you are configuring a field on a doForms form, that field can be aware of all of the other fields on that same page as well as all of the fields on other pages. This is a powerful principle that allows a doForms form to be responsive to the needs of the work at hand. If you want to skip over some questions based on the answer to a question, you can do that. If you want to add more questions or provide additional information through a lookup table that provides specific information from another source, you can do that. If you want to fill in a field using information from one or more fields on any other page in the app, you can do that.



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Tying these items together improves data quality and ultimately the business workflow. A programmer would call this conditional logic and background processing. doForms makes this power accessible without making it seem complex or programmatic.

The forms created in doForms are presented to the user through doForms client apps for tablets or phones on iOS or Android as well as web browsers on desktops. Depending on the platform used, the forms will resize based on form setting to accommodate form spacing needs.

A variety of other doForms features emerged from experience on the process automation battlefield:

- Partially completed forms can be saved and retrieved later or passed to another worker for completion, thereby implementing simple workflows.
- To allow more people to participate in business processes, you can send an email with a special doForms URL. The recipient, whether customer, partner, or vendor, can click to fill out the form. In this way, companies can require vendors or customers to enter information via doForms without purchasing a per-device license for them.
- Forms can also be accessed via web-accessible APIs so that data from a form can be easily included in spreadsheets or used by other programs.
- doForms has more than 25 widgets (called “tools”) for collecting information in simple and sophisticated ways such as scoring, trends, and sketching.
- Data processing capabilities in the form allow verification and validation of data collected by remote services for checking address quality or enforcing other types of data quality.
- Ecommerce capability built into the software enables (no-swipe) processing of credit and debit card charges.
- Forms, like paper, may be assigned, collected, and stored online and then sent by the person filling out the form or by a dispatcher to another person to pick up and continue the work.
- Currently, sending and receiving information from other business applications is handled from server side applications that communicate with the forms delivered through the mobile device.

While doForms is focused on making building applications easier for end users, when heavy lifting is needed, developers from the IT staff can weigh in using server-side APIs. Any heavy lifting required for advanced integration or other special needs can be taken care of.

## Who Should Use doForms?

doForms is an ideal solution for companies attempting to make the most of mobile devices to improve productivity. A variety of purchasing plans are available. The \$9.95 per device per month pricing makes it easy to get started. The price is \$14.95 per month if you want to use the server-based functions for dispatching work. Both pricing plans have discounts for annual payments. Data integration functionality is provided for \$4.95 per device for small and mid-sized businesses. (Enterprise integration requires a more consultative approach; contact doForms for details.)



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Here are some of the most attractive use cases:

- **Experimenting with mobilizing processes:** Without IT support, you can quickly get started to see if mobile capabilities actually help.
- **Replacing paper forms:** Replacing paper forms with doForms enables easy storage and retrieval of data, makes field data collection less tedious, and reduces errors.
- **Enhancing and automating data collection:** New types of data can be collected such as images, video, and audio. doForms can use mobile device capabilities to automatically add geolocation data or timestamps.
- **Empowering the edge:** In addition to collecting data, with server-based integration, mobile workers can kick off processes in business applications. Being able to communicate and ask questions during a process can also save large amounts of time.
- **Replacing heavyweight business apps:** Many business applications for fleet management or other sorts of mobilization are underutilized. doForms can replace such applications at a much lower cost, providing just the needed capabilities.
- **Mobilizing and integrating multiple business apps:** Applications that can benefit from mobility in one or two ways can be extended with doForms without having to bring the entire application to the device. In addition, one doForms application can collect information that can be delivered to many business applications.

The biggest advantage of doForms is its laser focus on the business user. Many other technologies are targeted at developers. Their mission is to make development—and the developer experience—easier. To use those technologies effectively, you must have a clear idea for an application.

doForms rejects that approach and instead uses the metaphor of the form to help the business user understand what's possible with mobile capabilities. doForms helps create a model of the work in the shape of forms. That's something most business users can easily understand.

Now that we have powerful affordable devices, excellent operating systems and software infrastructure, and pervasive, high-quality networks, doForms provides what's missing: a way to quickly create applications so that you can experiment and harness the power of mobility for your business.



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