

CASE STUDY

# A mobile forms makeover with ProntoForms

## BUSINESS GOALS

- Improve efficiency in the field
- Transition from paper to digital processes and archives
- Improve communication between stakeholders

## RESULTS

- 30 minutes per day per user saved (126 users activated)
- \$40,000 monthly cost savings
- Automated data distribution enables seamless communication

## The Challenge

Daytona Homes is a family-owned and -operated business that builds residential homes throughout Alberta, Saskatchewan, and Manitoba in brand new communities.

The company offers Home Orientation meetings, where Daytona Site Superintendents walk through the home with the customers, educating the new house-owners on how to take care of their new purchase. This process covers a lot of information, and a lot of forms.

Before ProntoForms, Daytona Homes employees used to have to carry around large plastic boxes containing all the paperwork for each new home. Each large box would contain about 8 projects, so people had to keep 3 or 4 boxes in their cars for the 40 jobs they commonly had on the go at any one time.

And back at the main office, storage facilities were overflowing with boxes containing all the paperwork. Not only was the company running out of room, there was no easy way to review the data found in all those files.

## The Solution

After deploying a smart mobile forms solution from ProntoForms, Daytona Homes employees can access all the information previously stored in the plastic boxes - customer files, contracts, warranties, and other documentation - on an iPad.

The Daytona Homes IT team leverages ProntoForms' conditional logic capabilities to build smart, adaptive, and dynamic forms that guide both employees and customers through the forms as they fill them out.

Selecting a certain kind of home at the top of a form, automatically hides all sections and questions that are not needed, and shows only the required form sections and questions on subsequent pages. No need to flip through a 50-page paper form to find the only relevant page, the form does it automatically. Entering a project number auto-fills all the relevant contact details, addresses, phone numbers and more, saving time in the field and improving data quality.

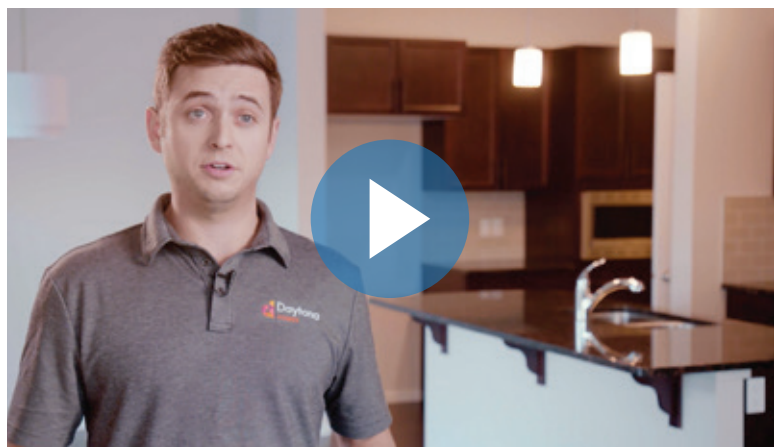
And, of course, the final sign-off on the new home is done right on an iPad as well.

## The Benefits

"Integrating ProntoForms with the data we already have from our in-house application has allowed us to create more accurate, less time-consuming forms for our field staff. The second the field staff goes in and brings up the form, they answer one to three questions and it pre-populates 20-30 questions that they would have had to manually enter before," said Chad Anderson, I.T. Analyst/Programmer.

"When I hit the submit button on the orientation form, it automatically sends a copy to the home site file as well as a copy to the purchasers, the sales consultant, the field technician, and the warranty coordinator. It also produces a confirmation tour form for my next meeting," said Eric Rivait, Site Superintendent.

"When forms get submitted from the field, they are automatically saved as a PDF file into the home site file under the specific division, and the job number, making it easy to track the process and view notes, photos and everything else," said Beatrice Jeannotte, Process Coordinator.



[Watch the video success story](#)