

# WHAT TO LOOK FOR IN MOBILE WORKFLOW AUTOMATION SOFTWARE

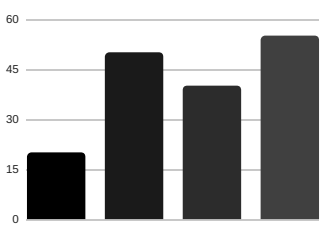
## STATES



States represent a stage in the lifecycle of a business process.

**What to look for:** Look for a tool that lets you create as many states as you need, and name them however you choose. This lets you build workflows that accurately reflect internal processes and scale your business more easily.

## REAL-TIME DASHBOARDS



Real-time dashboards help visualize all your business data in a rich and meaningful way.

**What to look for:** Look for a tool that lets you interact with and explore the data through flexible filters and drill-downs. You can target a specific data set down to the last detail, and find answers quicker.

## ROLE-BASED PERMISSIONS



Permission features let you summarize business data so it is relevant for each user. You can also limit data access for security reasons.

**What to look for:** Look for a tool that lets you create unlimited permissions for both roles and users, so you can effectively manage how data is accessed and by whom.

## REFERENCE DATA



Reference data refers to lists such as customers, parts, and locations. Choosing from a list will pre-fill any fields with data that is already in your system.

**What to look for:** Find a solution that combines reference data with offline capabilities. This lets you pre-load data into the app before losing internet connectivity, so you can have all the info you need to continue working offline.

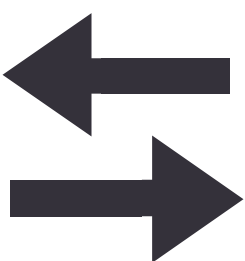
## AUTOMATIC EMAIL NOTIFICATIONS



Email notifications are automatic messages that notify users as soon as a business transaction happens.

**What to look for:** Find for a tool that lets you create unlimited email notifications with customizable email recipients, senders, and messages. That way, you can send custom messages for every task.

## TWO-WAY DATA FLOW



Two-way information flow means you can submit and look up company data from anywhere.

**What to look for:** Find a tool that allows you to pull up and edit mobile forms, even after the data has been submitted. This helps you easily correct any errors or add additional info while you're still out in the field.



[START A FREE 30-DAY TRIAL](#)