



2 North Main Street
Southampton NY 11968
631-287-3270
www.portableforms.com

Integrating Portable Forms with Your Data Systems

Portable Forms is designed with you in mind – your ideas, your needs, and your data. One of the powerful features of Portable Forms is how easily it takes the data collected on a handheld device and delivers it to a variety of data systems. This document discusses the different data delivery methods supplied by Portable Forms and provides a guide for connecting with your back end.

Portable Form's Three Methods for Data Delivery

Everyone's needs vary and Portable Forms allows you to use the delivery method that best meet yours. To accomplish this, Portable Forms has three separate ways of delivering data:

1. Electronic Delivery of Documents
2. Internet Delivery of Collected Data
3. Delivery of Data to Local Databases

Each of these methods is designed to meet your specific business needs and you are not limited to a single delivery method per form. In fact, you can link delivery methods automatically at the same time leveraging one, two or all three of the methods as appropriate for your requirements (there is a limit of eighteen (18) separate deliveries each time that you fill out a form). For example, consider this form for customer relationship management. (This Portable Form is a Rich Text Format (rtf) document created in an editor such as Microsoft Word.)



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Prospective Customer Evaluation Form

Name: _____

Address: _____

Phone: _____

Contact: _____

Type of Company: _____

Size: _____

Products Interested In: _____, _____, _____

Purchase When: _____

This is how this document looks when made into a Portable Form.



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Prospective Customer Evaluation Form

Name: [Prospect Name]
Address: [Street Address]
 [City] [State] [Zip]
Phone: [Phone]
Contact: [Contact Name]
 [Contact Email Address]
Type of Company: [Type of Company]
Size: [Company Size]
Products Interested In: [Product 1], [Product 2], [Product 3]

Purchase When: [Purchase When]

After the form is "Uploaded" to the Portable Forms server, you would select "Modify" and receive this screen:

Modify Document CRM Form

Edit Form Variables Prospect Name Street Address City State Zip Phone Contact Name Contact Email Address Type of Company Company Size Product 1 Product 2 Product 3 Purchase When	Edit Data Transfers e-mail fax e-mail CSV Add New Transfer ←
Edit Form Cover Chuck Schwartz Portable Forms 2 North Main Street Southampton NY 11968 Phone: 631-287-3270 Fax: 212-858-5777	

Data Transfers are established by tapping the link shown with the arrow. This loads the Portable Forms Data Transfers Instruction Screen where you select the methods the Portable Forms server will use to deliver your data after the form is filled out.

Data Transfer for Document CRM Form

Select Transfer Type

e-mail fax 1- Document Delivery Types

e-mail CSV post to URL 2- Internet Data Delivery Types

post XML

Destination: ← Delivery Instructions

Save Cancel

Portable Forms Data Delivery instructions are entered one at a time. In our example, when the Portable Form “CRM Form” is completed and transmitted to the Portable Forms Server three emails and one fax (**Electronic Delivery of Documents**), a web posting and xml posting (**Internet Delivery of Collected Data**) will all occur at the same time as indicated below. Depending on how your handheld computer connects to Portable Forms, data can also automatically be stored in a Microsoft Access™ .mdb file. (**Delivery of Data to Local Databases**).

Edit Data Transfers

[e-mail \(chuck@rovenet.com\)](#)

[e-mail \(rovenet-test@rovenet.com\)](#)

[fax \(12128585777\)](#)

[e-mail CSV \(rovenet-test@rovenet.com\)](#)

[post to URL \(http://www.rovenet.com/WebDB/PostForm.asp\)](#)

[post XML \(http://www.rovenet.com/xmldemo/default.asp\)](#)

[Add New Transfer](#)

Let's review the three ways of delivery in more detail:

1. Electronic Delivery of Documents

Since Portable Forms start with documents, one of it's great features is it's ability to take the data that you collect remotely, reformulate your document with this project specific data and then deliver the document electronically as emails or faxes. Fill out once, deliver many, in seconds.

In the CRM form example above an email with the completed form attached is sent out, and a fax is also sent.

Email .rtf Attachment



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Prospective Customer Evaluation Form

Name: Allied Supply
Address: 45 Main Street
Southampton NY 11968
Phone: 631-283-9987

Contact: Jim Lazlo
jlo@alliedsup.com

Type of Company: Building Supplies
Size: 50 employees
Products Interested In: Portable Forms Server, Portable Forms Client, Handheld Computers
Purchase When: 30-60 Days

Facsimile

To: Page 2 of 2

2004-01-17 15:10:40 (GMT)

Wireless Fax From: Rovenet

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Southampton NY 11968
631-287-3270

www.portableforms.com

Prospective Customer Evaluation Form

Name: Allied Supply
Address: 45 Main Street
Southampton NY 11968
Phone: 631-283-9987

Contact: Jim Lazlo
jlo@alliedsup.com

Type of Company: Building Supplies
Size: 50 employees
Products Interested In: Portable Forms Server, Portable Forms Client,
Handheld Computers

Purchase When: 30-60 Days

Alternative Formats

Besides working with Rich Text Format documents, Portable Forms can also work with HTML (.htm or .html) and ASCII text files (.txt).

The original form has to be created and up-loaded in the desired output format. Here is how the CRM example form might look in html:

CRM Form.htm

```
<html><body>
<br><br>
Prospective Customer Evaluation Form<br><br>
Name: [Prospect Name]<br>
Address:      [Street Address]<br>
             [City] [State] [Zip]<br>
Phone: [Phone]<br>
Contact:      [Contact Name]<br>
Email:        [Contact Email Address]<br>
Type of Company: [Type of Company]<br>
Size: [Company Size]<br>
Products Interested In:      [Product 1],  [Product 2],  [Product 3]<br>
Purchase When: [Purchase When]
</body></html>
```

When Portable Forms uses an html file document it delivers it as a formatted html email as shown below:



Prospective Customer Evaluation Form

Name: Allied Supply
Address: 45 Main Street
 Southampton NY 11968
Phone: 631-287-3270

Contact: Joe Lazio
Email: jlo@alliedsup.com
Type of Company: Building Supplies
Size: 50 employees
Products Interested In: Portable Forms Server, Portable Forms Client,
 Handheld computers
Purchase When: 30 – 60 days

Similarly ASCII text files can be created if a high degree of formatting for the email output is not necessary. The CRM Example form might look like this in ASCII text:

```
[Prospect Name],[Street Address],[City], [State],[Zip]
[Phone],[Contact Name],[Contact Email Address]
[Type of Company],[Company Size]
[Product 1],[Product 2],[Product 3]
```

This Portable Form will be delivered like this:

CRM Form.txt

```
Allied Supply,45 Main Street,Southampton, NY,11968
631-287-3270,Joe Lazio, jlo@alliedsup.com
Garage,50 men
Portable Forms,Portable Forms Server,Portable Forms Client
Handheld computers
```

Which email format to use?

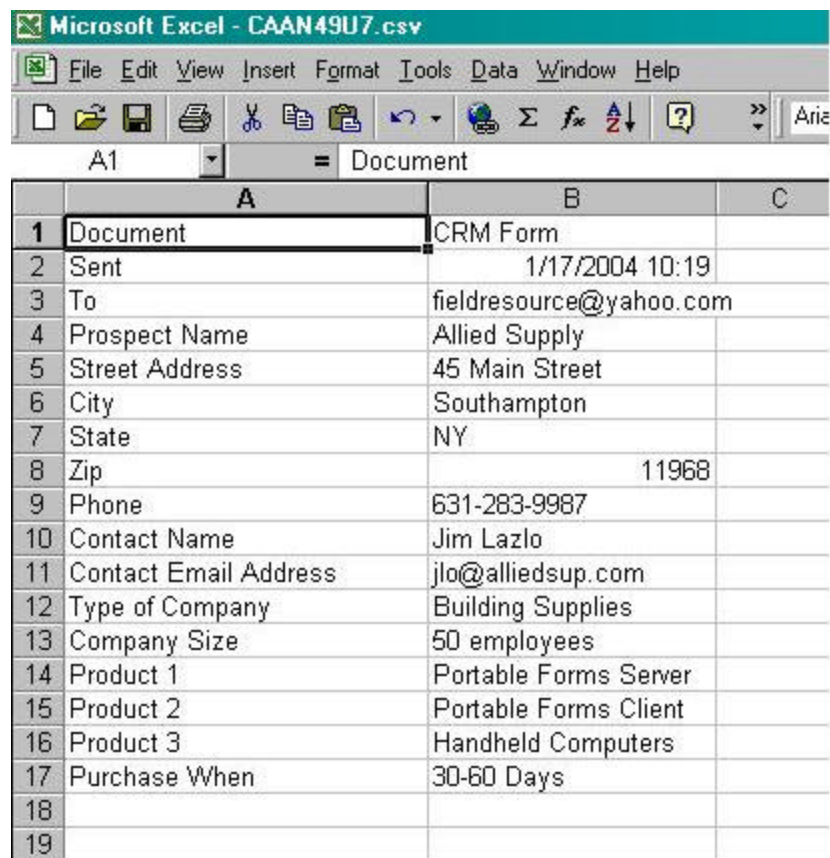
It really depends on your application. If your goal is to build a strong form with your letterhead or invoice then use RTF. If your goal is less formal business correspondence, HTML delivery inside of formatted emails is a great quick way to communicate with customers. Finally, ASCII text files are a quick and easy way to build data for communication to other software systems.

2. Internet Delivery of Data

Another of Portable Forms' powerful features is its ability to automatically deliver the data that you collect in the field to other data systems via the Internet. There are three types of Portable Forms Internet deliverables:

- **Comma Separated Variable Text File**

Portable Forms can deliver emails with attached files of your collected data set contained in Comma Separated Variable (CSV) format. This file can then be opened in an editor, spreadsheet, databases or programmatically. As an example here is the CSV file collected for the CRM Form from above which was opened in Excel:



The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C
1	Document	CRM Form	
2	Sent	1/17/2004 10:19	
3	To	fieldresource@yahoo.com	
4	Prospect Name	Allied Supply	
5	Street Address	45 Main Street	
6	City	Southampton	
7	State	NY	
8	Zip	11968	
9	Phone	631-283-9987	
10	Contact Name	Jim Lazlo	
11	Contact Email Address	jlo@alliedsup.com	
12	Type of Company	Building Supplies	
13	Company Size	50 employees	
14	Product 1	Portable Forms Server	
15	Product 2	Portable Forms Client	
16	Product 3	Handheld Computers	
17	Purchase When	30-60 Days	
18			
19			

- **XML Delivery of Data to URL**

Rovenet's goal is to provide a quick and easy way to take data collected on mobile devices and deliver it to other data systems in a way that require minimal programming resources to parse and use. Portable Forms' ability to deliver information directly to Internet web addresses in XML format is a very powerful way to achieve this goal. (XML or Extensible Markup Language is a text markup language for interchange of structured data and has become a standard for data exchange.)

XML created by Portable Forms is delivered in Really Simple Data Exchange (RSDX) format. This data format operates in a similar way to standards such as RSS (Really Simple Syndication), a lightweight XML format designed for sharing headlines and other Web content. As an example, the data set collected on the CRM Form was delivered as this XML document.

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
- <PORTABLE-FORM NAME="CRM Form">
  <PROSPECT_NAME>Allied Supply</PROSPECT_NAME>
  <STREET_ADDRESS>45 Main Street</STREET_ADDRESS>
  <CITY>Southampton</CITY>
  <STATE>NY</STATE>
  <ZIP>11968</ZIP>
  <PHONE>631-283-9987</PHONE>
  <CONTACT_NAME>Jim Lazlo</CONTACT_NAME>
  <CONTACT_EMAIL_ADDRESS>jlo@alliedsup.com</CONTACT_EMAIL_ADDRESS>
  <TYPE_OF_COMPANY>Building Supplies</TYPE_OF_COMPANY>
  <COMPANY_SIZE>50 employees</COMPANY_SIZE>
  <PRODUCT_1>Portable Forms Server</PRODUCT_1>
  <PRODUCT_2>Portable Forms Client</PRODUCT_2>
  <PRODUCT_3>Handheld Computers</PRODUCT_3>
  <PURCHASE_WHEN>30-60 Days</PURCHASE_WHEN>
</PORTABLE-FORM>
```

- **Web Posting of Data**

Equally powerful is Portable Form's ability to create HTML Forms Posts of data to Internet URL addresses. This allows Portable Forms to feed data to existing web data systems with little or no changes required.

When Portable Forms delivers information to web addresses it is in a format that is equivalent to this filled out web page:

```
<html><head><title>Form Equivalent to Portable Forms Data Post</title></head>
<body>
  <FORM ACTION="http://www.rovenet.com/WebDB/PostForm.asp" METHOD="POST">
    Prospect Name:<INPUT TYPE="TEXT" NAME="PROSPECT_NAME" ><br>
    Street Address:<INPUT TYPE="TEXT" NAME="STREET_ADDRESS" ><br>
    City:<INPUT TYPE="TEXT" NAME="CITY" ><br>
    State:<INPUT TYPE="TEXT" NAME="STATE" ><br>
    Zip:<INPUT TYPE="TEXT" NAME="ZIP" ><br>
    Phone:<INPUT TYPE="TEXT" NAME="PHONE" ><br>
    Contact Name:<INPUT TYPE="TEXT" NAME="CONTACT_NAME" ><br>
    Email Address:<INPUT TYPE="TEXT" NAME="CONTACT_EMAIL_ADDRESS" ><br>
    Company Type:<INPUT TYPE="TEXT" NAME="TYPE_OF_COMPANY" ><br>
    Size:<INPUT TYPE="TEXT" NAME="COMPANY_SIZE" ><br>
    Products Interested In:<br>
    Product 1:<INPUT TYPE="TEXT" NAME="PRODUCT_1" ><br>
    Product 2:<INPUT TYPE="TEXT" NAME="PRODUCT_2" ><br>
    Product 3:<INPUT TYPE="TEXT" NAME="PRODUCT_3" ><br>
    Purchasing When:<INPUT TYPE="TEXT" NAME="PURCHASE_WHEN" ><br>
    <INPUT TYPE="RESET" NAME="" ><INPUT TYPE="SUBMIT" NAME="" >
  </FORM>
</body>
</html>
```

3. Delivery of Data to Local Databases

Depending on your computer configuration and connection, Portable Forms is able to automatically place your collected data in a Microsoft Access™ .mdb file on the local PC during a HotSync or ActiveSync communications session. This feature is available to non- wireless handheld computers that are running the Portable Forms Connector system during communications and optionally to wireless handheld computers. To configure this function follow these steps:

- Start Portable Forms Connector on your Personal Computer. The Portable Forms Connector icon will appear in the system tray. 📱
- Right click on the Portable Forms Connector icon. Select the **Local Archive** option to maintain a record of all transactions sent to the Portable Forms server from the syncing PC. This data is available as a Microsoft Access .MDB file. (%SysDrive%\Program Files\pfconnector\ Archive.mdb)

