

Qrew Bulletin Board

NEW

Fastfield Office Hours

M,W,F at 2pm EST

[Quickbase.com/events](https://quickbase.com/events)

Office Hours Update

With Sam Trachy

Everyday 1pm EST

Sign up on the Events Page!

[Quickbase.com/Events](https://quickbase.com/Events)

Apply to be Qrew Champion!

The Qrew Champions program is for passionate Quickbase customers interested in advocacy and community leadership opportunities

Connect with Me



Have questions, want to do an app showcase, or need help connecting with another network member?
Reach out to Esther LaVielle
elavielle@quickbase.com

Private & Confidential

Upcoming Qrew Events

Quickbase Events (Meetings, Webinars, In-person Meet Ups)

[Pipelines Customer Network Qrew Tuesday 1/23 at 12PM EST](#)

[Healthcare Customer Network Qrew Wednesday 1/24 at 12pm EST](#)

[Manufacturing Customer Network Qrew Wednesday 2/7 12PM EST](#)

[Realm Admin Customer Network Qrew Wednesday 2/14 at 12PM EST](#)

[App Builders Customer Network Qrew Tuesday 2/13 12PM EST](#)

[*Mobile Customer Network Wednesday 2/21 at 12PM EST](#)

[AEC Customer Network Qrew Tuesday 2/20 at 12PM EST](#)

[Education & Non-profit Customer Network Qrew Wednesday 2/28 at 12PM EST](#)



Mobile Workflow Customer Network

Wednesday January 17th, 2023 12pm EST

Agenda



- Introductions & Housekeeping
- **Menti:** Open Discussion with Esther and Quickbase Mobile Product Manager: Polina Georgieva
- Mobile Approach & Use Cases
- Quickbase Mobile – Optimization tips
- Quickbase Mobile – What’s next for 2024
- Demo
- Q&A



Your Qrew Administrator



Esther LaVielle

Customer Success Manager

- Quickbase CSM since Jan 2022
- Located in Portland, OR

Quickbase Expert



Polina Georgieva

Quickbase Mobile Product Manager

- Quickbase Product manager since ____?
- Located in Sofia, Bulgaria

Mobile Workflows Customer Network

- This group is for all customers utilizing a mobile workflow on either Quickbase Mobile, FastField, or both – **or** – are considering adding a mobile workflow.
- We're partnered with the **Quickbase Product Team** to gather feedback, share feature updates, address customer challenges, and offer solutions
- **We meet monthly:** Every 3rd Wednesday of the month at 12pm EST
- **Your participation will make this group a success!**
 - Volunteer to share your mobile use case (Get 1000 points on Qrew Champions)
 - Give feedback to our Product team – **LIVE**

Q1 AGENDA

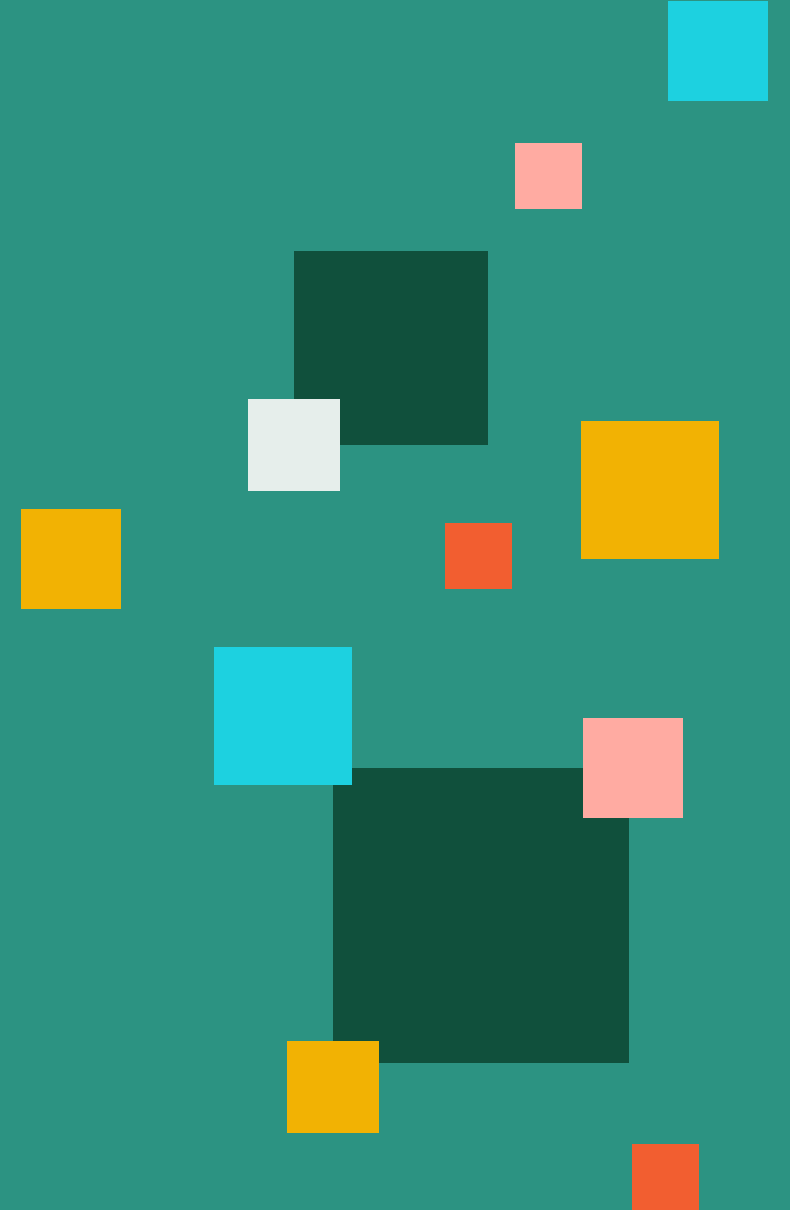
January: Quickbase Mobile: New Forms

February: FastField Overview and Q&A

March: Bringing it together:
FastField + Quickbase



Menti Time!



Menti Instructions

Go to

www.menti.com

Enter the code

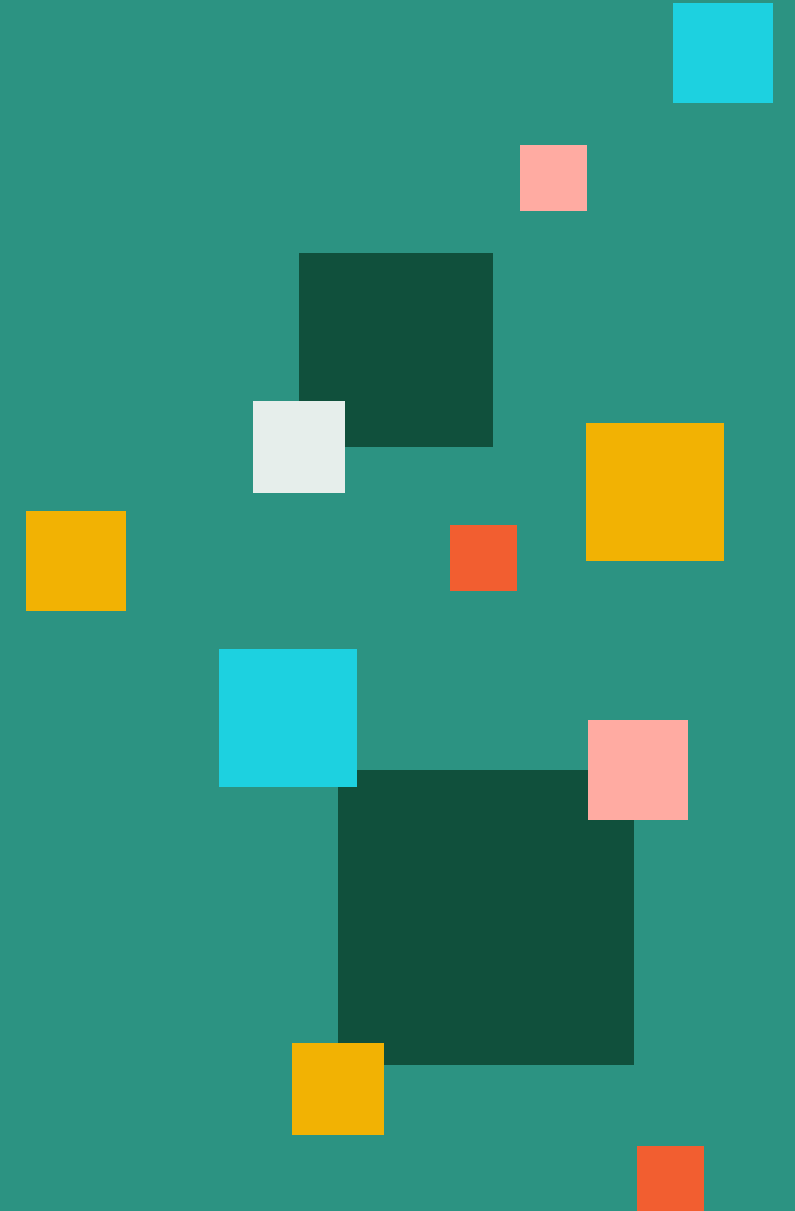
65 56 01 6



Or use QR code



Quickbase Mobile Approach & Common Use Cases



Quickbase Mobile Approach

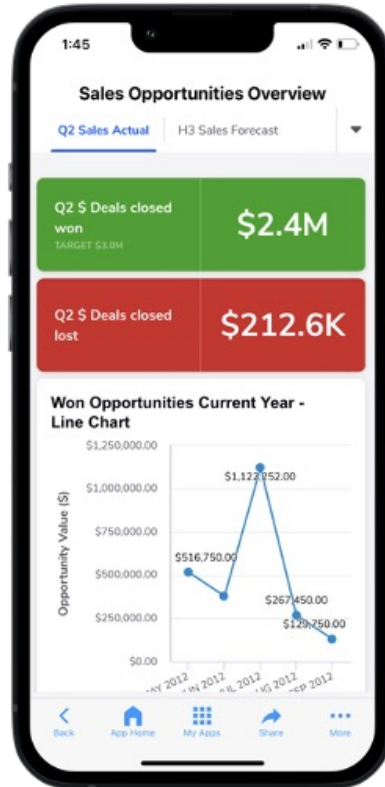
Our mobile offering keeping all teams connected on the go

Capabilities

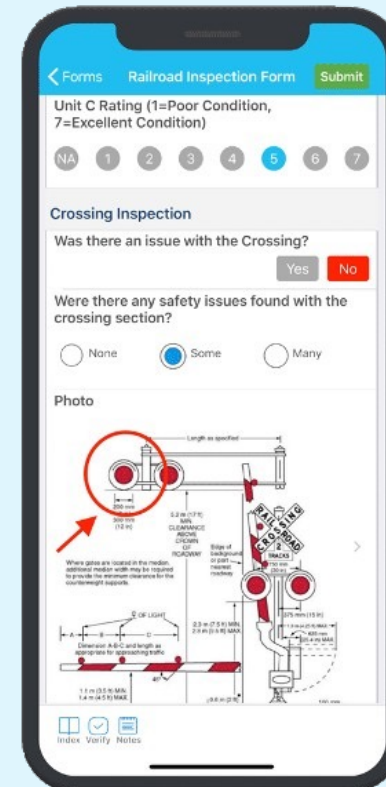
- Applications instantly available on mobile
- Mobile real-time reporting
- Access to business-critical data right when you need it

Use Cases

- Project Management & Tracking
- Operational Reporting
- Business Workflows



Quickbase Mobile



FastField

Capabilities

- Capture data, GPS location and annotate photos on the field
- Dispatch tasks and automate your entire field workflow
- Collect data even without an Internet connection
- White-labeling

Use Cases

- Inspections & Incident reporting
- Work Orders & Timesheets
- Safety & Compliance
- Asset Management

Quickbase Mobile Application

Use Case Examples



Operational Reporting

Real-time operational reporting – access critical business metrics and performance indicators on the go



Business Workflows

Execute critical tasks - communicate updates, approve invoices or PTOs, coordinate on tasks and projects



Project Management

Track ongoing projects, manage timelines, and oversee task completion, ensuring continuous project oversight



Employee Portals

Employee portals for HR or IT related tasks such as onboarding new employees or providing access to company policies

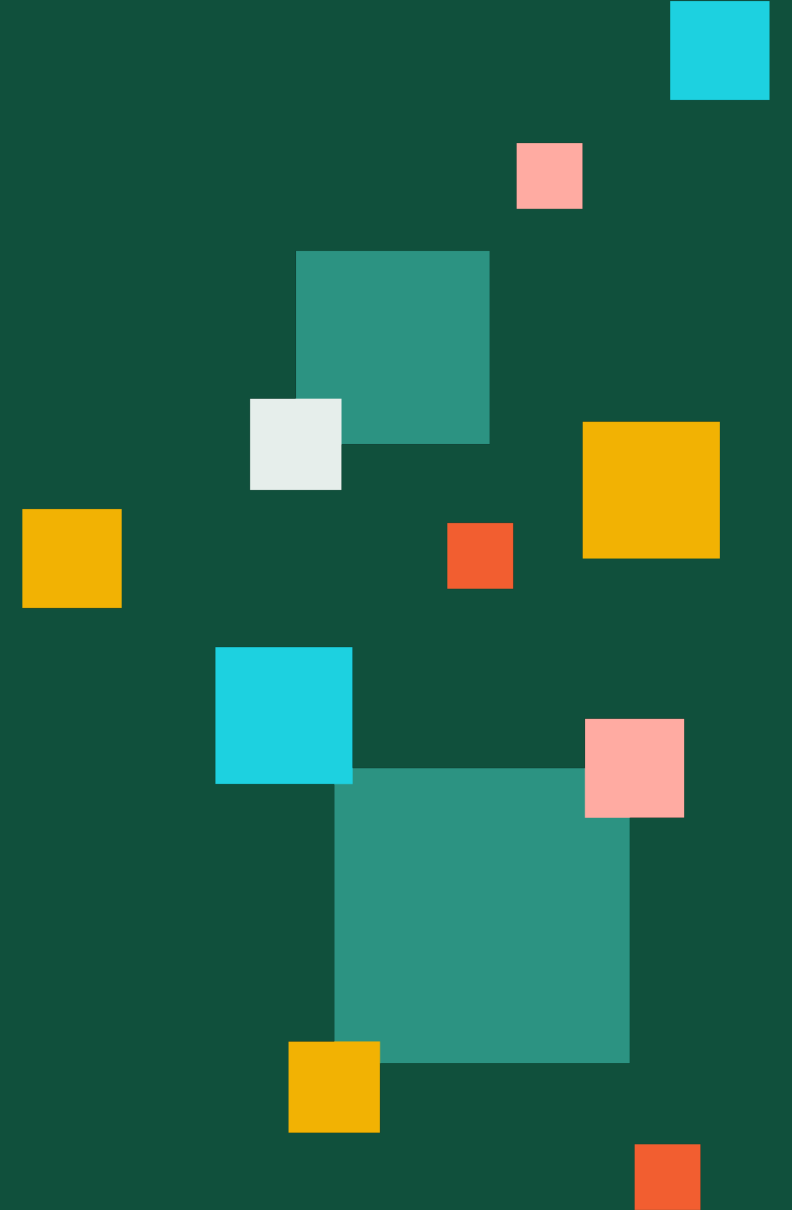


Sales & CRM

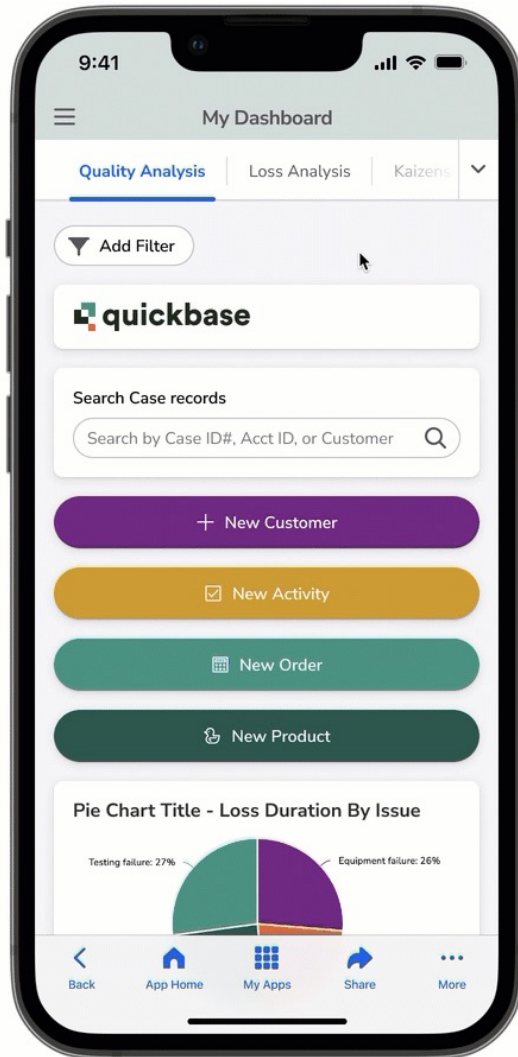
Access customer data, track sales pipelines, and monitor customer interactions & activities on the go



Quickbase Mobile: What's new & Optimization tips



Focus on the Move with Mobile Dashboards



 Your dashboards **instantly available** on mobile devices

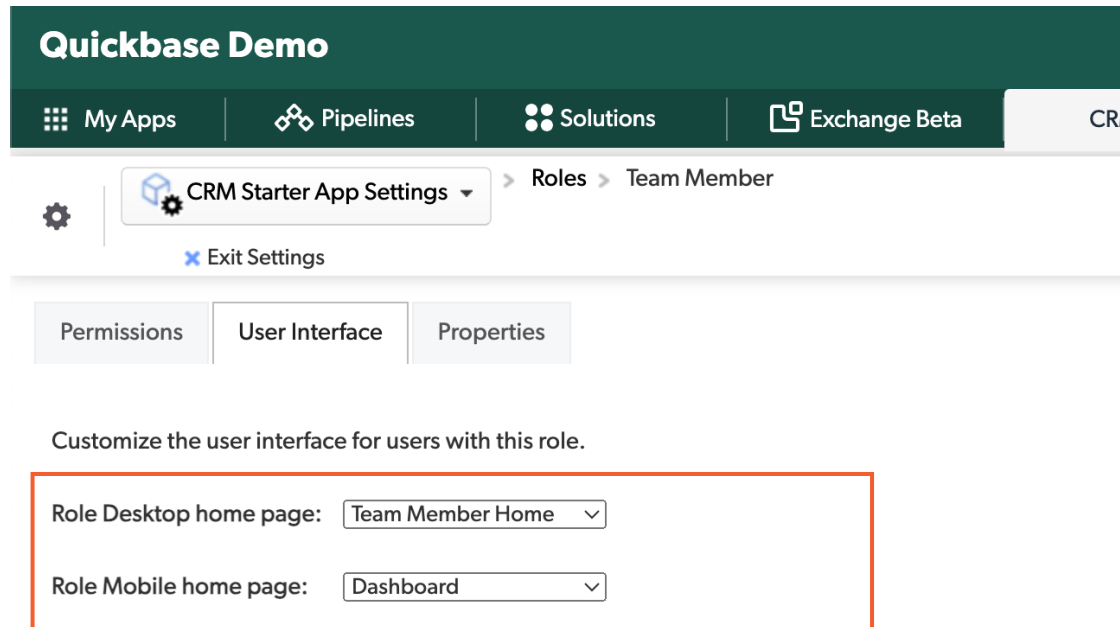
 Modern and **mobile-friendly user interface**

 Define where users land after creating records, guiding them to the right destination

 **Access critical data** with a single glance, no more hunting information on different pages

Optimizing the mobile experience

Assign a mobile-specific default dashboard for a focused & tailored experience



Quickbase Demo

My Apps | Pipelines | Solutions | Exchange Beta | CRM

CRM Starter App Settings > Roles > Team Member

Exit Settings

Permissions | **User Interface** | Properties

Customize the user interface for users with this role.

Role Desktop home page: Team Member Home

Role Mobile home page: Dashboard

- Consider the device limitations – mobile vs tablet
- Reduce clutter & display only information relevant for mobile users
- Arrange the dashboard widgets in an order, which would make sense for mobile users

Optimizing the mobile experience

Practical Tips for Enhancing Your Mobile Dashboards

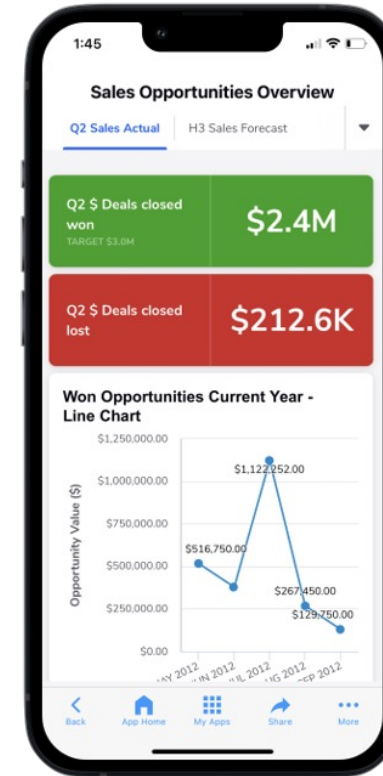


Include widgets that are relevant to the purpose of the dashboard and provide actionable insights

- Prioritize Key Information – prioritize the most important information and actions at the top of your dashboard

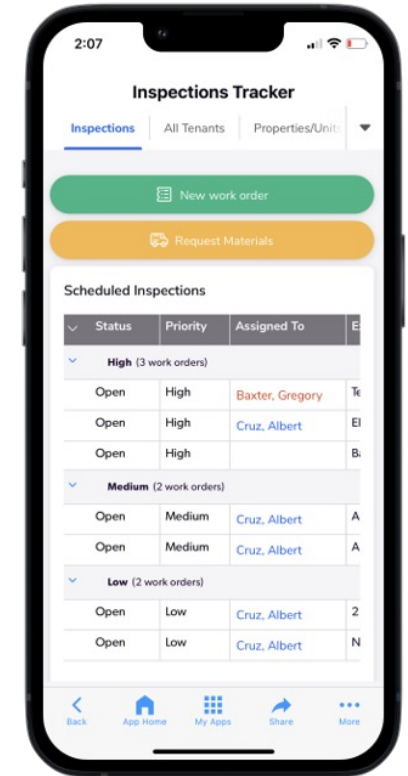


3 to 5 widgets per tab - helps maintain clarity and focus



Insights

VS

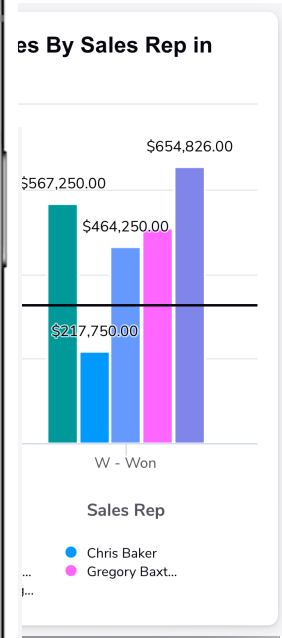
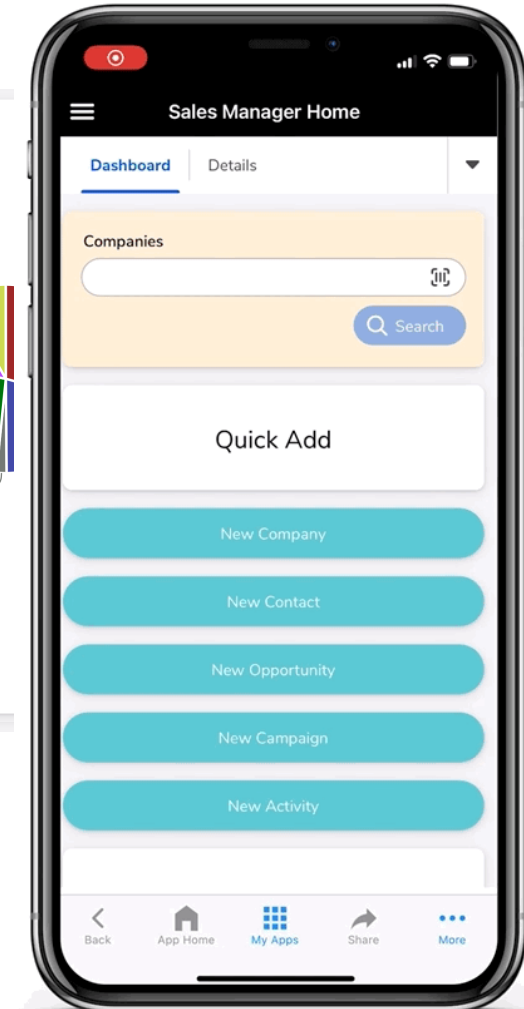
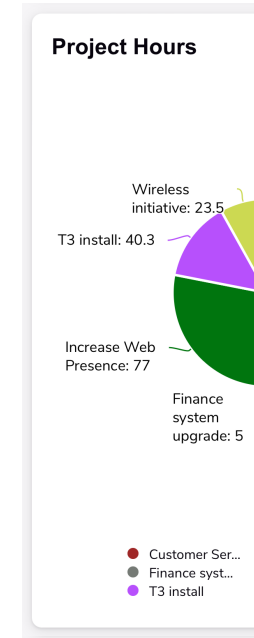


Actions

Optimizing the mobile experience

Utilizing Buttons and Navigation to Streamline Workflows

- ✗ Not all widget types are suitable for mobile devices – avoid long, data-heavy tables, detailed Gantt charts, complex scatter or multi-layer area charts
- ✓ Better alternatives might be KPI widgets, line, bar or pie charts, summary reports
- ✓ Table reports – place the most important columns and rows first, as these will be visible without scrolling
- ✓ Configuring Post-Save Redirection for button widget



Optimizing the mobile experience

Assign mobile-specific forms to streamline data management

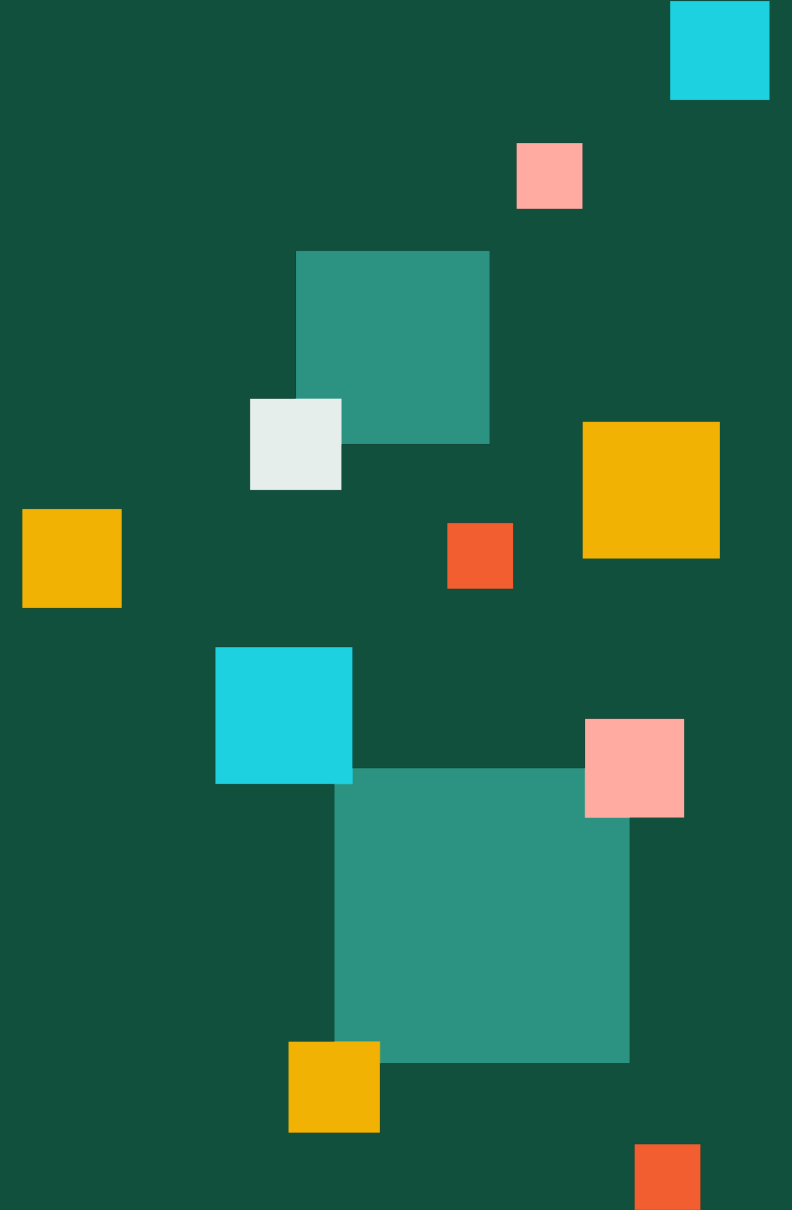
Set how different roles use these forms

Search roles 5 roles

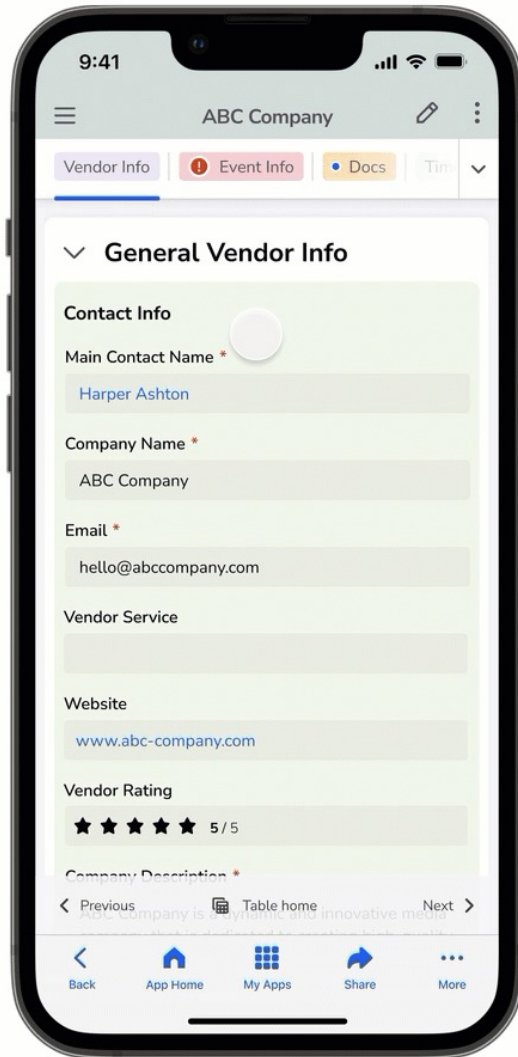
Role	View Form (Full Site)	Edit Form (Full Site)	Add Form (Full Site)	Grid Edit (Full Site)	View/Edit/Add Form (Mobile)
Everyone (except those specified below)	Companies Main Form	Companies Main Form	Companies Main Form	Search and select	Companies Mobile Form
Administrator					<Use Full Site forms>
Management					Companies Main Form
Team Member					Companies Mobile Form

- Build a mobile-specific form for a smooth experience based on mobile users' needs
- Reduce the number of fields and only focus on the relevant data that needs to be collected
- Consider the layout of Legacy Forms on mobile – single column with no tabs
- New Forms are not yet supported on mobile

Quickbase Mobile: What's next for 2024




What's next: New mobile forms experience



 Your forms instantly available on mobile devices without any additional building needed

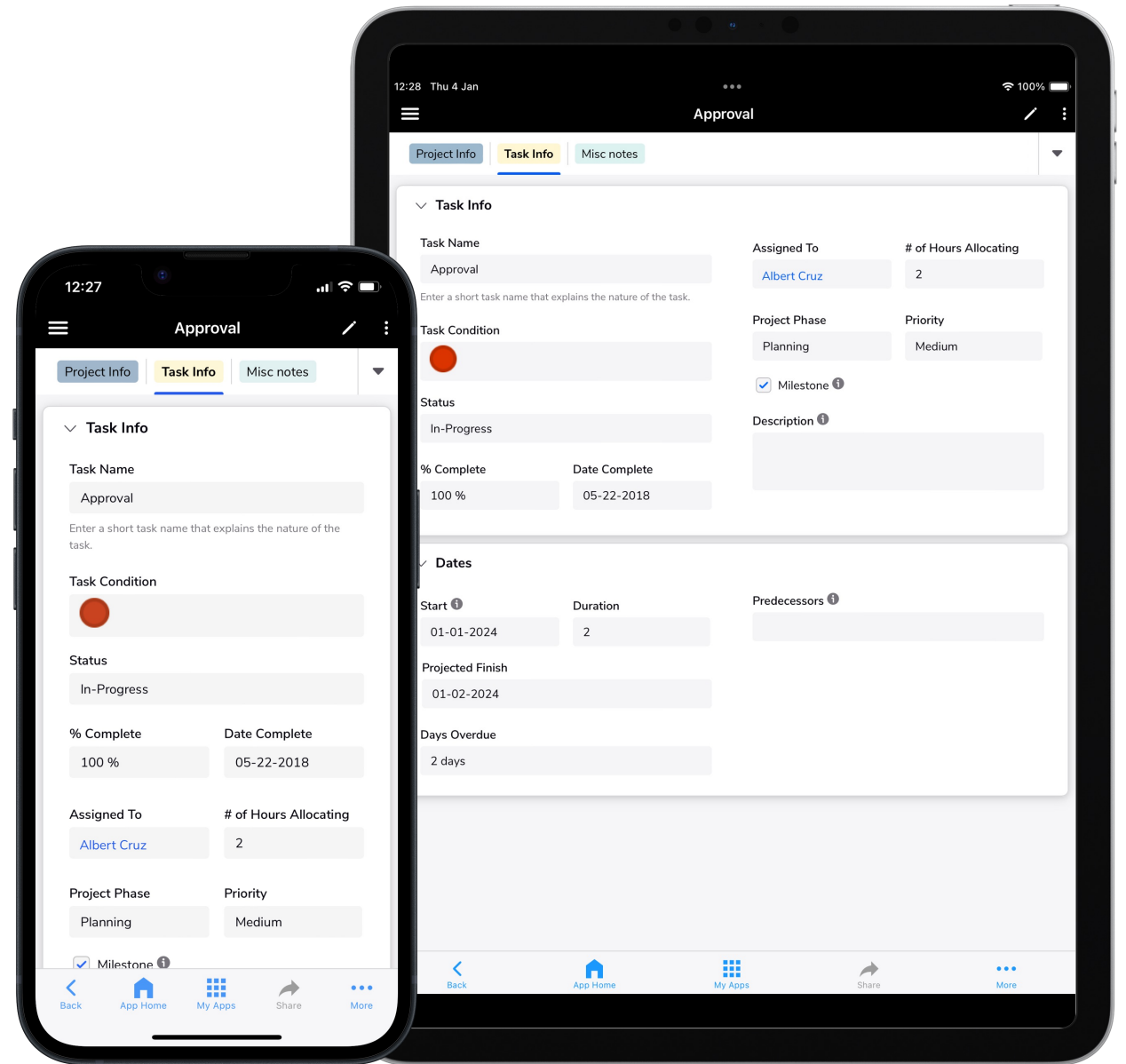
 Responsive forms' canvas based on device size – phone vs tablet

 Intuitive user experience optimized for the mobile device



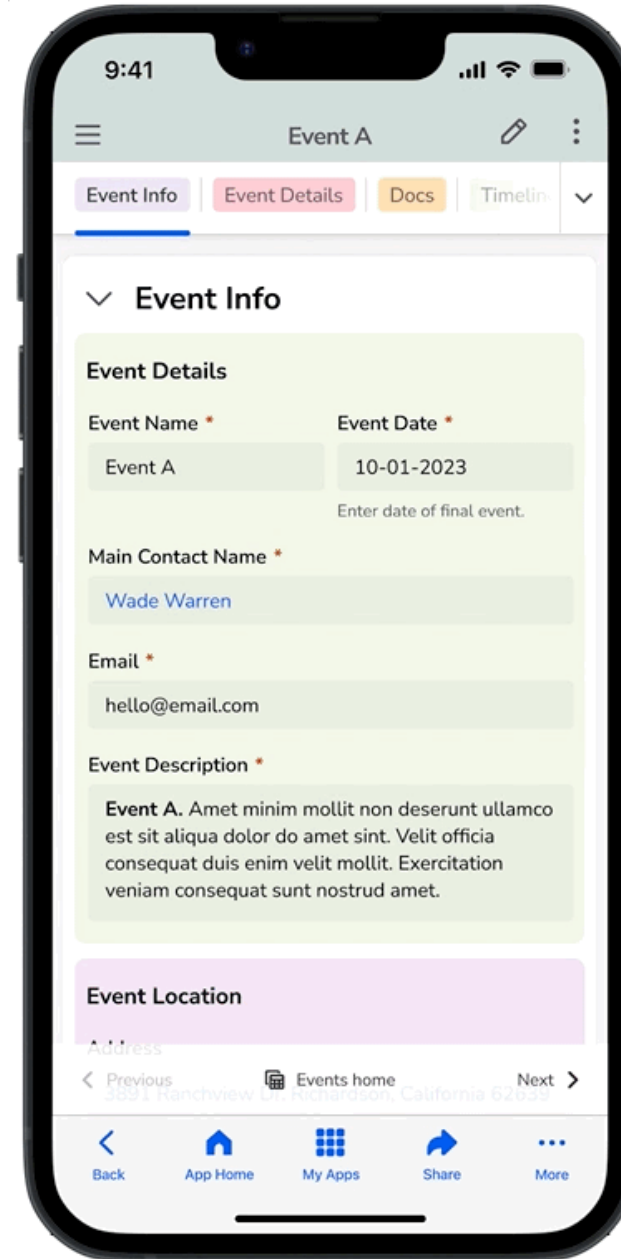
New Forms Canvas

Responsive Layout, Seamless Experience



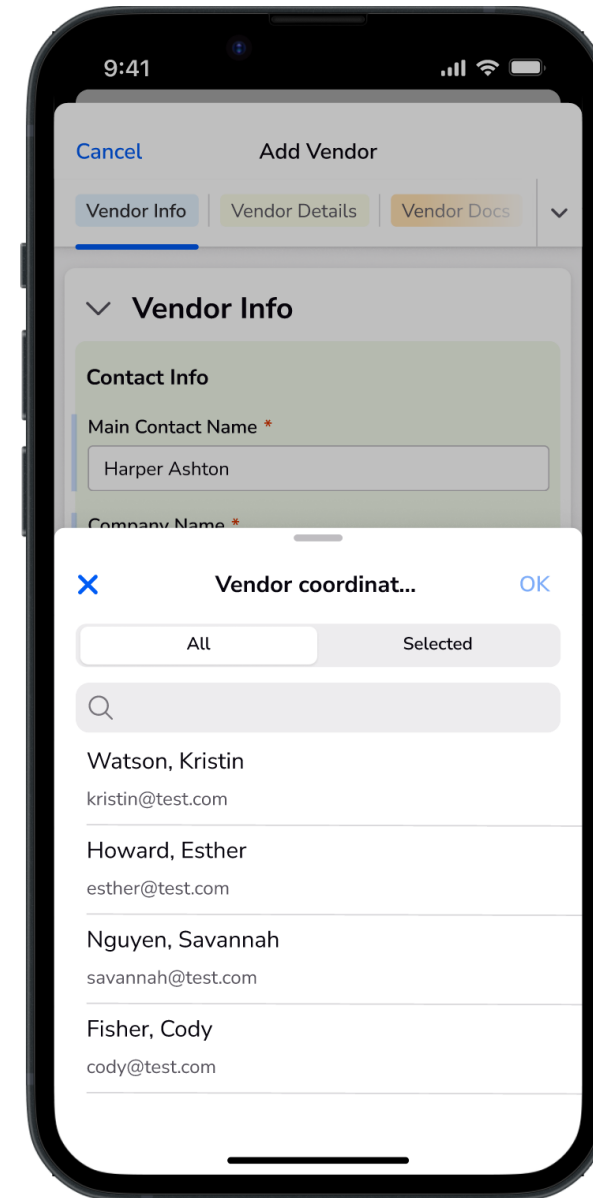
New Forms Canvas

Tabs, Sections, and Grouping for Tailored Form Layouts



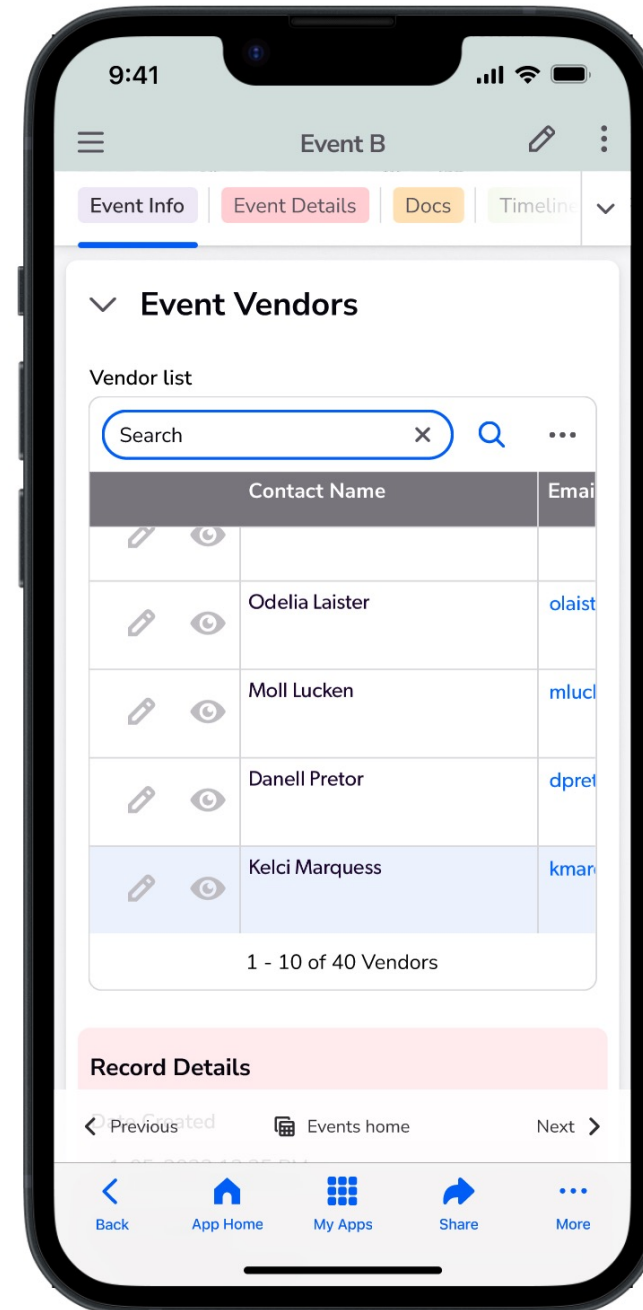
Mobile-optimized Components

Effortless Interaction and Accessibility

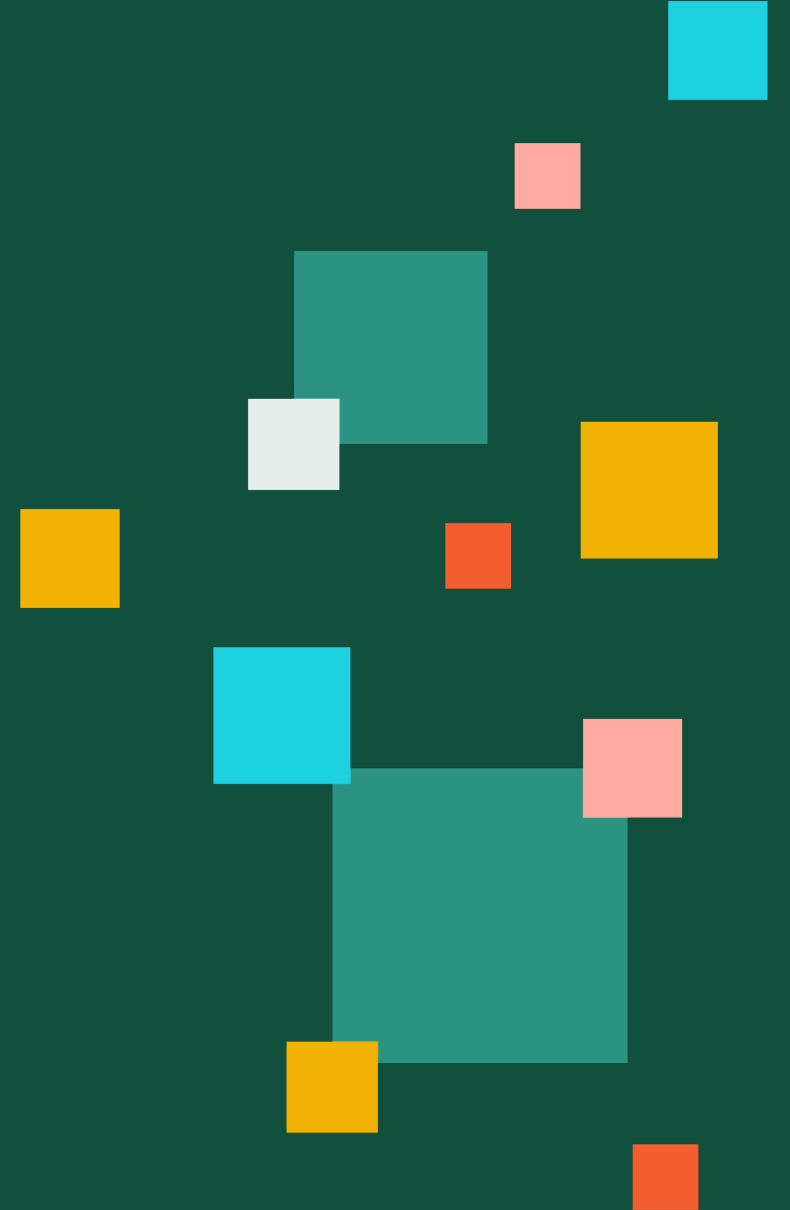


Embedded reports

Streamlining Access to Data Directly on the Forms Canvas



Demo



QUESTION & ANSWER SESSION





**THANK YOU FOR
ATTENDING!**

Next Meeting: February 21st, 2024 at 12pm EST

