



FORMS PREFILL IN FLUIX

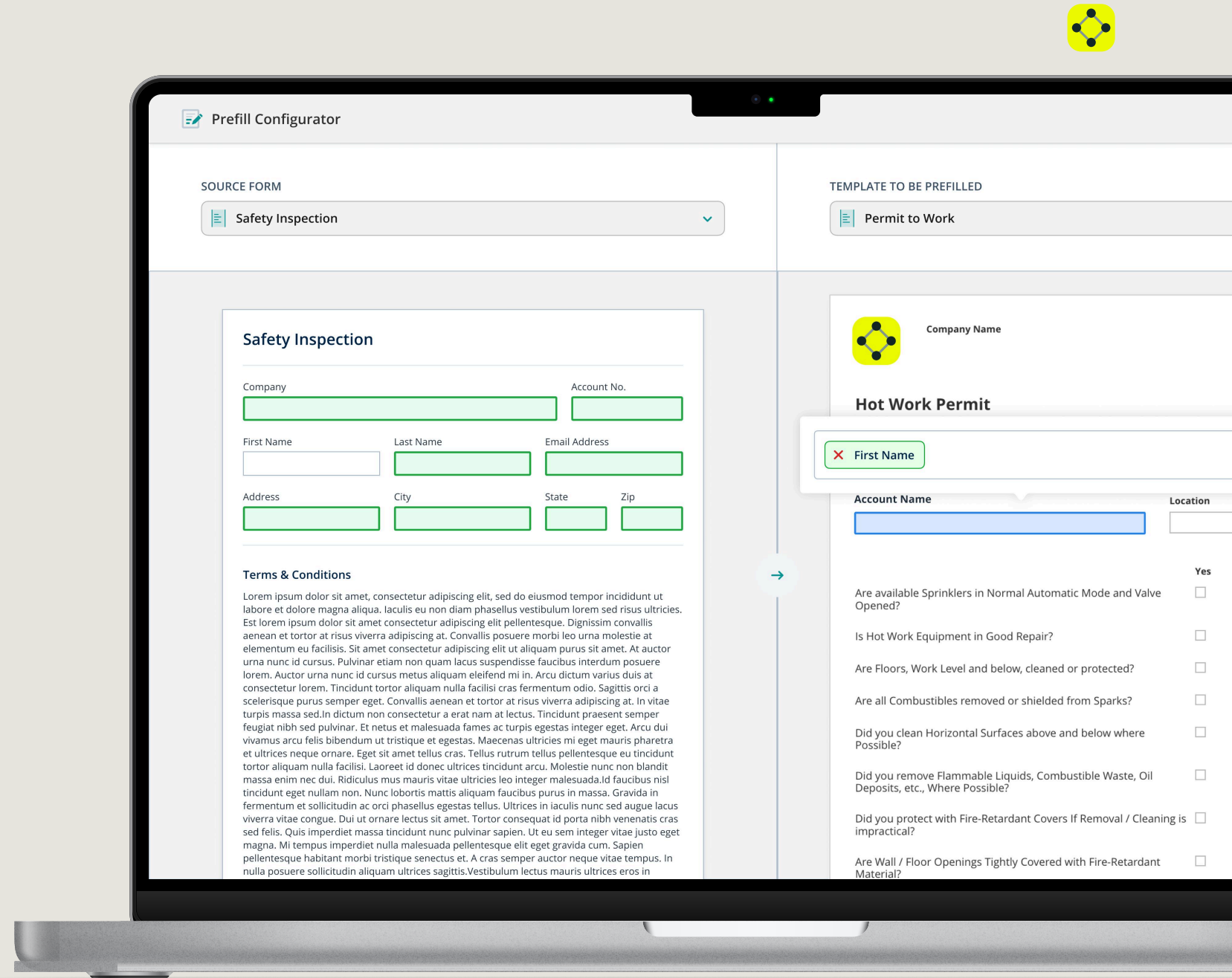
One Entry. Every Document. Always Audit-Ready.

A screenshot of a mobile application form titled "Safety Inspection". The form has a white background and a grey header with "FLUIX" and a menu icon. It contains several input fields: a large greyed-out field at the top, a field with a horizontal bar, another large greyed-out field, and another field with a horizontal bar. Arrows point from the CRM icon to this form.A screenshot of a mobile application form titled "Permit to Work". The form has a white background and a grey header with "FLUIX". It contains several input fields, some of which are outlined with dashed lines, indicating they are pre-filled or have specific data. Arrows point from the Safety Inspection form to this one.

● FORMS PREFILL

WHAT IS FORMS PREFILL?

Forms Prefill fills in your forms for you, using information you've already verified – whether it came from a form your team submitted earlier or from another tool you rely on, like your CRM or customer database. Enter a detail once and it flows into every related document, identical every time. And if something's different on site that day, anyone can update a prefilled field by hand.





THE PROBLEM YOU'RE SOLVING

Field inspectors complete 2–15 reports a day, and far too much of that time **goes into retyping the same details — location, asset IDs, crew names, client information — across form after form.** Every re-entry is another chance for a typo or a mismatch to slip into the record.

Forms Prefill ends that: your team enters the information once, and the same verified data carries into every related document automatically.

With Forms Prefill, field teams fill in a single form; Fluix populates every related record with the same verified data — **eliminating the typos and mismatches that fail compliance reviews.**

The same site address, asset ID, and crew lead get keyed in again and again across inspections, checklists, work orders, and closeout reports.

Small mistakes are easy to make in the field — a wrong digit, a misspelled name, a field left blank — and each one is a discrepancy waiting to surface in a review.

One mistyped or missing field can mean redoing an inspection and paying for a second trip to fix it.

Customer and asset records fall behind because the latest details are still on a clipboard somewhere.



THE OUTCOMES YOU GET

Records that hold up the moment an auditor asks. Because every form pulls from a single verified source, your asset IDs, site codes, and client details match across every linked document. No reconciling conflicting spreadsheets, no chasing down which version is right — your records are review-ready by default.

Typos eliminated at the source. When information is entered once and reused everywhere, there's no second keystroke to get wrong. The mistyped digits, transposed numbers, and missed fields that bounce a report back for correction — and trigger a return trip — simply don't happen.

The screenshot shows a configuration interface for a form. On the left, a 'Pre-fill Logic Setup' panel is open, showing a 'SELECT DROPDOWN AND PROPERTY' section with 'site-name' selected and mapped to the 'Site Name' field. Below, 'AUTO-POPULATED FIELDS' are listed: 'city' mapped to 'City' and 'vehicle-type' mapped to 'Vehicle Type'. The main panel, titled 'Pre-trip vehicle inspection', shows an 'Overview' of the form fields: 'Site Name' (pre-fill property: Site Name, ID: site-name), 'City' (pre-fill property: City, ID: city), and 'Vehicle Type' (pre-fill property: Vehicle Type, ID: vehicle-type).

The screenshot shows a 'Forms Prefill' configuration window for 'Equipment Inspection 2'. It prompts the user to 'Select the data source for prefill:' and lists three options: 'Forms completed in previous tasks', 'Fluix initiates prefill from external tool', and 'External tool initiates prefill'. On the right, a flowchart shows a process starting with 'Process Start Task-Driven Start', leading to 'Forms Prefill', and then to 'Review the form'.



THE OUTCOMES YOU GET

One entry, every document. Your team fills in a single form, and that same data populates every related record in the workflow. The more documents a job requires, the more time and risk you take off your team's plate.

More inspections in a day, same team. With repeat fields already filled, your technicians move through reports in minutes instead of starting from a blank page, giving them time back for paid, on-site work. With prefill, your volume can climb while manual work and audit risk remain flat.

Safety Inspection

Company: Account No.:

First Name: Last Name: Email Address:

Address: City: State: Zip:

Terms & Conditions

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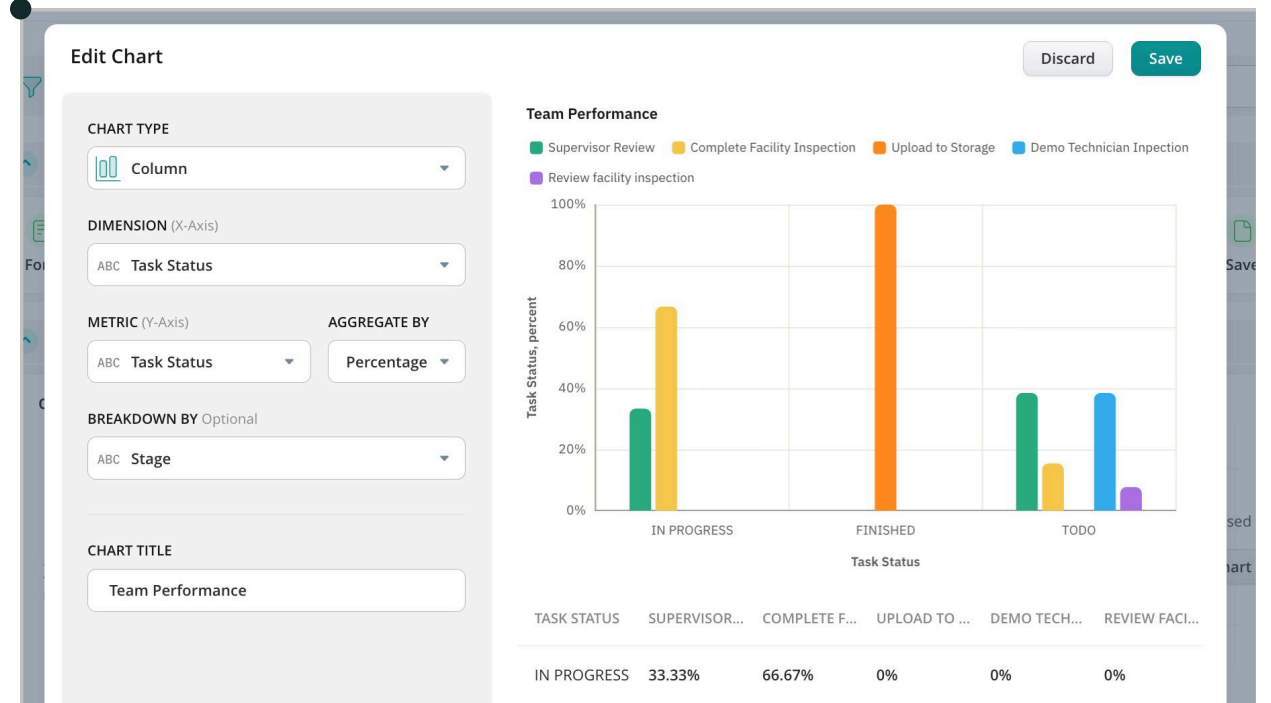
Company Name

Hot Work Permit

First Name

Account Name: Location:

	Yes
Are available Sprinklers in Normal Automatic Mode and Valve Opened?	<input type="checkbox"/>
Is Hot Work Equipment in Good Repair?	<input type="checkbox"/>
Are Floors, Work Level and below, cleaned or protected?	<input type="checkbox"/>
Are all Combustibles removed or shielded from Sparks?	<input type="checkbox"/>
Did you clean Horizontal Surfaces above and below where Possible?	<input type="checkbox"/>
Did you remove Flammable Liquids, Combustible Waste, Oil Deposits, etc., Where Possible?	<input type="checkbox"/>
Did you protect with Fire-Retardant Covers If Removal / Cleaning is impractical?	<input type="checkbox"/>
Are Wall / Floor Openings Tightly Covered with Fire-Retardant Material?	<input type="checkbox"/>





FOUR WAYS TO PREFILL IN FLUIX

Method	How It Works	Best For
1. From completed forms	Reuses details your team already verified on past forms.	Information that lives in Fluix and should carry from one job to the next.
2. Dropdowns from a data file	Pulls dropdown choices from a spreadsheet you keep up to date.	Lists that change often — clients, equipment, or project sites.
3. From your other tools	Fluix pulls the details it needs from another tool while the work is happening.	Bringing in verified info from a system you already use.
4. Started by another tool	When something updates elsewhere, a ready-to-go task appears in Fluix automatically.	When another tool should kick off the work for you.

● FORMS PREFILL



In a personalized 1-on-1 session, you'll see how Forms Prefill fits your workflows and set up a trial account to try it for yourself. Tighten up your records and start gaining back time from Day 1.

AVAILABILITY

Forms Prefill is included starting from the **Fluix Operations Plan**. Compare plans on our [Pricing page](#).

FIELD WORK DONE RIGHT.

Field Work Done Right. Instant Visibility.
Effortless Reporting. Right Decisions.

[Email us](#) to enable this feature.

EMAIL :

support@fluix.io

WEBSITE :

fluix.io

PHONE :

US: [+1 888 894 6815](tel:+18888946815)

UK: [+44 330 818 0695](tel:+443308180695)