

Ad Hoc Forms - In the Mobile App

12/23/2024 10:39 am CST

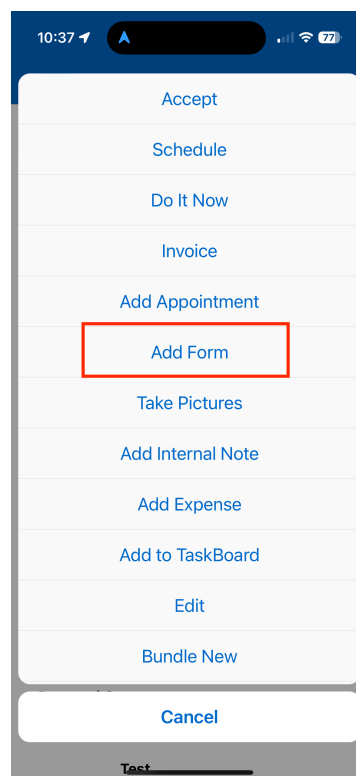
Overview

Just as with a proposal on the web, Ad Hoc forms can be attached to proposals in the mobile app. It's a bit different than on the web, so read on!

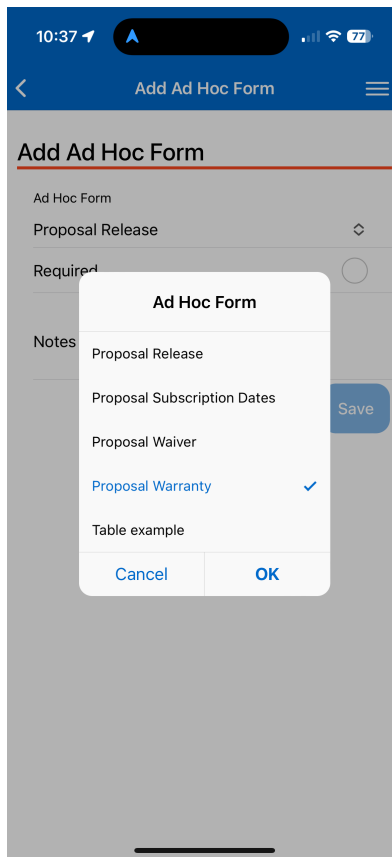
Navigation

A Mobile App user may attach Ad Hoc Forms via the mobile app, while out in the field.

As with all Mobile App appointment actions, this workflow is accessed by clicking the vertical 3-dot icon at the top right. The proposal must be created and saved before a form may be added.



The agent may then choose the form to be attached,:



Now the form is tied to the appointment, notes may be added, and the form can be signed by the customer directly on the app:

Add Ad Hoc Form

Ad Hoc Form

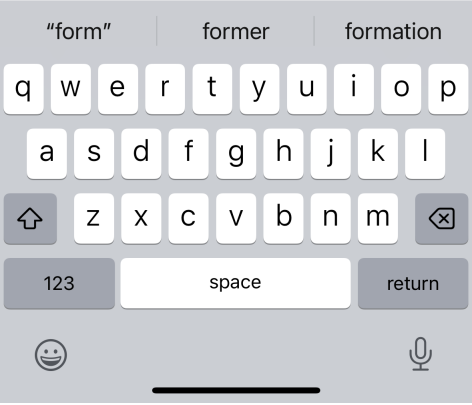
Proposal Warranty




Required

Notes

notes for the form

Save




10:38    76%

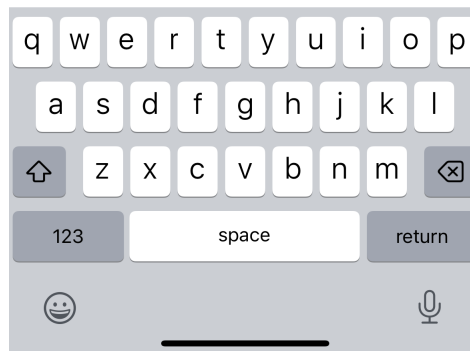
< Signature

Name*

desdemona



Cancel Clear Sign



By clicking the three dots at the top right, the agent can see the form attached, then view or delete the form:

10:40

76

<

Accepted Proposal

	Test Checkbox	No	
6	Drawer Face - Flat	\$55.00	\$330.00
Flat drawer			
	Test Checkbox	No	
		Subtotal	\$400.00
		Denton County-Frisco-TX	\$0.00
		Total	\$400.00
		Duration	1 hours

Ad Hoc Forms

Proposal Warranty

Date 9/9/24
Signed 9/9/2024 11:38a by desdemona

Internal Notes

...	When	Who
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Acceptance

This proposal was **accepted** on Monday, September 9, 2024 on behalf of desiby Karen Libby

Additional

FAQ

Could ad hoc forms be used as a questionnaire for my office staff to fill out when scheduling proposals for certain appointments?

Ad Hoc forms are customer-facing documents. However, you can use [Checklists](#) which will give you a lot of the functionality you are talking about.