Ad Hoc Forms

06/16/2025 2:20 pm CDT

Overview

Ad Hoc Forms are customizable and able to be viewed or printed by customers.

Settings and Navigation

To access Ad Hoc Forms, go to Control Panel > Ad Hoc Forms.

Setup Ad Hoc Forms

Create a Name and Title for the form not forgetting to make it active and select when the form is to be used. The message of the form is to be entered and saved. You can use shortcode to drop in a variety of information, and use markdown for formatting.

Edit Ad Hoc Form Templ	ate	
Name* Artive? Kind* Default Required? Title*	Invoice Form Invoice On Proposal Accept Shortcode Test 10-6	
Editor		
1 This is a test, {contac 2 3 We at {organization.nam 4 that you owe us money f	t.name}, on this invoice Ad Hoc Fo we} thank you for your business an for Invoice {invoice.number} in the	orm. d want you to understand e amount of {invoice.balancedue}.
Billing Address Name of Company Attn: Accounts Payable 1234 Main Street Plano, TX 75074 (805) 704-1325 libbykaren@gmail.com This is a tes, Bodie Kahuna We at Bob's Handyman, Pla money for Invoice 2577 in t	Service Address Bodie Kahuna 1452 E Plano Pkwy Plano, TX 75074 (805) 704-1325 on this invoice Ad Hoc Form. ano thank you for your bouiness and war he amount of \$270.63.	Date September 25, 2023 In you to understand that you owe us
Your Name		Clear
	Sign1	

We added a Default Required checkbox that can be set on the Ad Hoc Form Templates or it can be set when you

add the form to the proposal or appointment directly. Any required forms will have be signed by the client before they can accept the proposal. If they hit Accept with pending required forms, we'll display an error indicating which form(s) need to be signed first.

Add Ad Hoc Form Temp	late
Name*	
Active?	
Kind*	Contact v
Default Required?	On Proposal Accept
Title*	

Adding a form to an Appointment

A form can be added to an appointment. Once an appointment has been created, you can go to the tabs and click on **Forms**. From here, you can add or edit a form as long as it is an Appointment type.

The same fields are needed whenever you add a form. You need to select if it is required and adding notes is optional.

d Hoc Fori This is a fo	m rm ▼				
Required	?				
This fo	rm needs	to be comp	leted for t	the appointm	nent.

Once saved, if the form is required then it will appear with an asterisk (*).

Addillo	onal Defai	IS						
Мар	Notes (O)	Recurring Appointments	Pictures	Videos	Documents	Audits	Forms *	Checklists
Page	1 of 1 (1 items							
<u>Add</u>	Requ	ired		Created				
<u>This is a</u>	form Yes			6/16/20	25 1:33p			

Adding an Ad Hoc form to a Proposal

On the right had side, hit Add... and select the correct form.

	Deposit 25% Selected Options Back Yard, Other Room Duration 8 hours			Add Margin 88 %				
_				Internal Notes				
				Add	When	Who		
				Ad Hoc	Forms			
		Rate	Amount	Name	Created	Signed	Ву	
_		0.00	\$0.00	Audits				
		0.00	\$0.00	When 8/11/2022 4:26p	Action Copied	Who Sari Papazian	Where	
			Å: 000 00					
Ad Hoc Form Ad Hoc Form	Proposal Releas	se 🔻						
	Required?							
Notes								
							I	Save
Req	juired chec	kbox can	be applied di	rectly to the a	ad hoc form w	vhen adding to	the proposal.	

The form will appear on the proposal with the ability to click and open. See screenshot below:

bob's Handyman - Plano B308 Preston Rd 350 232 Plano, TX 75093 B60) 786-4121 marketing@serviceminder.com www.serviceminder.co acuere software llc Billing/Service Address Bart Carlos 2344 Boatman Dr Suite 34 Little Elm, TX 75068 (234) 244-4455 bart.carlos@serviceminder.co he notes for your form. This is a test paste here tuff goes here MARKDOWN This form was signed on Friday, January 7, 2022 by my name.	Propos	al Warranty
marketing@serviceminder.com www.serviceminder.co acuere software llc Billing/Service Address Bart Carlos 2344 Boatman Dr Suite 34 Little Elm, TX 75068 (234) 244-4455 bart.carlos@serviceminder.co he notes for your form. Date January 7, 'his is a test paste here tuff goes here MARKDOWN This form was signed on Friday, January 7, 2022 by my name.	ob's Handyman - Plano 308 Preston Rd 350 232 uite 350-232 lano, TX 75093 360) 786-4121	bob's handyman
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		11

FAQs

How can I make it so that when a technician is closing an appointment, they are required to have the customer sign off on the completed work?

You can view and test them by creating one in **Control Panel > Ad Hoc Forms**. You can enter whatever text you'd like on the form. When viewing it from the appointment, the field to capture the signature will appear.

These can be added on the Appointment Details page under the Forms tab or eventually set up to add automatically through Drip Triggers. There is a checkbox for 'Required'.

The only other way to mark a process as required would be through Appointment Custom Fields. These can be created via **Control Panel > Custom Fields > Appointments** section in the top right.

There you can create your custom field and mark it as required with some additional help text. It would look something like this when creating:

Edit a Custom Appointm	ient Field
Name*	Completion of Work
Active	
Required	
Order*	0
Category	Property v
Field Type*	String T
Unlimited Text?	
Copy From Previous	
Increment From Previous	
Phase	Finish Phase 🔻
	This determines when this custom field can be edited.
Help Text	I fully acknowledge completion and satisfaction of work done
Service Availability	All Services

And like this in the appointment:

Blue	Property	Smoke Alarm	Exterior	Move	Checkbox list	Other
Comp	letion of Work					
I fully o	acknowledge o	ompletion and satis	faction of wo	rk done		