# Ad Hoc Forms

12/05/2025 11:48 am CST

## Overview

Ad Hoc Forms are customizable, customer-facing documents used to gather signatures. These forms can be added to proposals, appointments, or invoices and are fully viewable and printable by your customers. Because they support shortcodes and basic formatting, Ad Hoc Forms make it easy to present accurate, professional documentation while streamlining the signature process.

This article will review:



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## Settings and Navigation

To add or edit Ad Hoc Forms, navigate to **Control Panel > Ad Hoc Forms**.

Ad Hoc Forms

Ad hoc form templates.

From here, you can choose **Add** to create a new form, select **Edit** to make changes to an existing form, or click the name of a form to view a preview.

Ad Hoc Forms

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| Add... | Name | Active | Kind | Title | Created | Updated |
|---|---|---|---|---|---|---|
| Edit | Form for Appointment | Yes | Appointment | Form for Appointment | 3/29/2022 12:25p | 11/20/2024 1:23p |
| Edit | Invoice Form | Yes | Invoice | Invoice Form | 12/9/2024 11:06a | 12/5/2025 10:22a |
| Edit | Proposal Release | Yes | Proposal | Proposal Release | 3/29/2022 12:26p | 1/8/2024 8:25a |
| Edit | Proposal Warranty | Yes | Proposal | Proposal Warranty | 12/6/2021 3:33p | 1/4/2023 11:50a |
| Edit | Test Appointment Form | Yes | Appointment | Test Appointment Form | 6/21/2024 10:43a | 6/21/2024 10:45a |
| Edit | Work Order | Yes | Appointment | Work Order Agreement | 10/23/2025 4:23p | 12/5/2025 10:25a |

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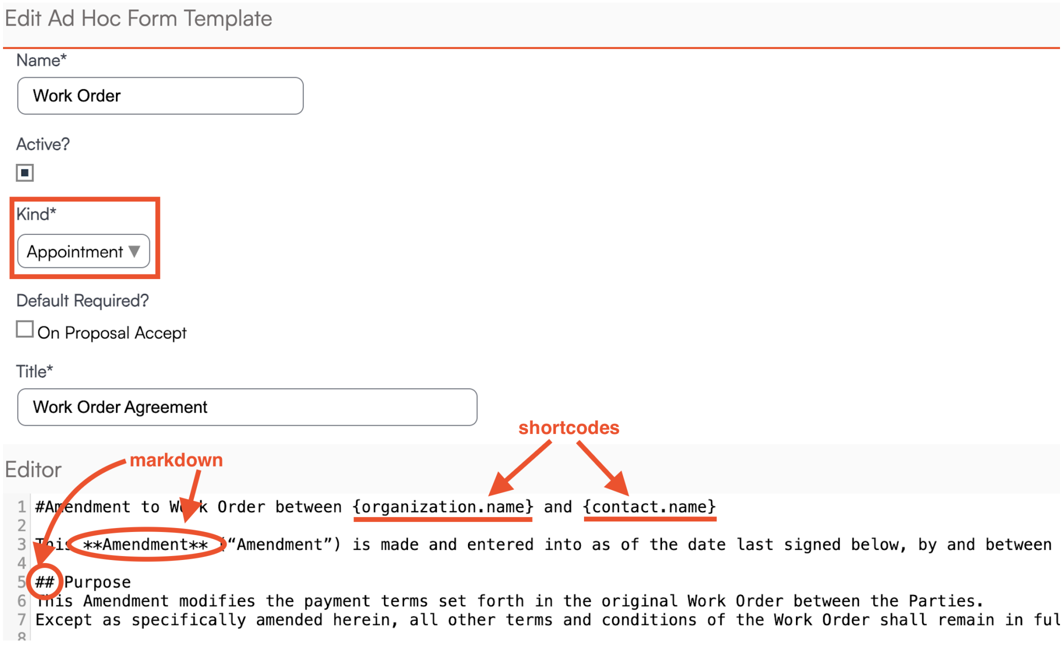
## Create an Ad Hoc Form

Click **Add** to create a new Ad Hoc Form and complete the following fields:

- **Name**: This is an internal name for your reference when choosing forms to add to items in the system.
- **Active:** Make sure this box is checked so the form can be used.
- **Kind:** Designate this form to be used on **Proposals**, **Appointments**, or **Invoices** (this dictates which

shortcodes will be compaitble with the form).
- **Default Required**: You have the choice to set this form as required upon accepting the proposal.
- **Title:** This is the customer-facing name for the form.

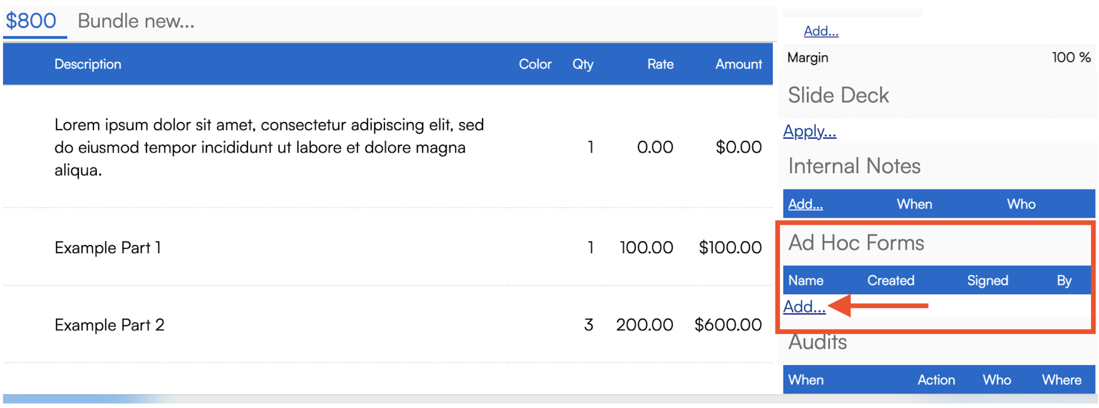
In the **Editor** field, draft the body of the form.
- Use **Shortcodes** to automatically populate information in the form.
- Use **Markdown Scripting** to control the formatting (i.e., make text bold or create headers).




# Using Ad Hoc Forms

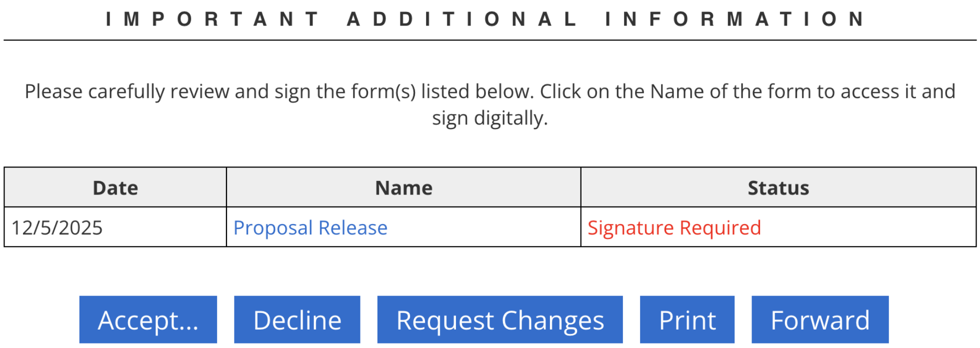
## Add a Form to a Proposal or Invoice

On a proposal or invoice details page, locate the Ad Hoc Forms section on the right side of the screen. Click **Add**.



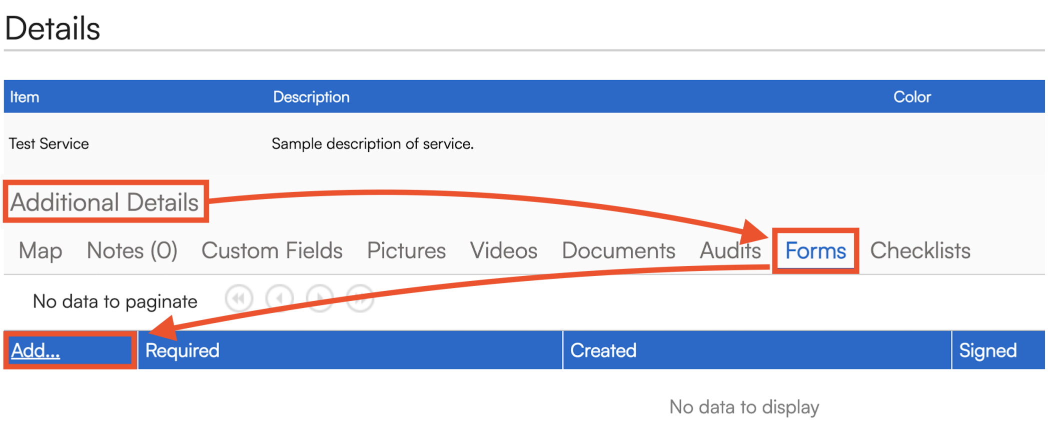

Choose the form you want to use from the dropdown menu.
- Check the **Required** box if you want the form to be mandatory.
- Use the **Notes** field to leave any notes to your customer about the form.


The form will appear in the **Important Additional Information** section. The customer can click the hyperlinked name of the form to open and sign. If marked as required, the status will say "Signature Required" and acceptance of the proposal and/or payment of the invoice will be prevented until that is complete. If not required, the status will say "Ready to Sign."

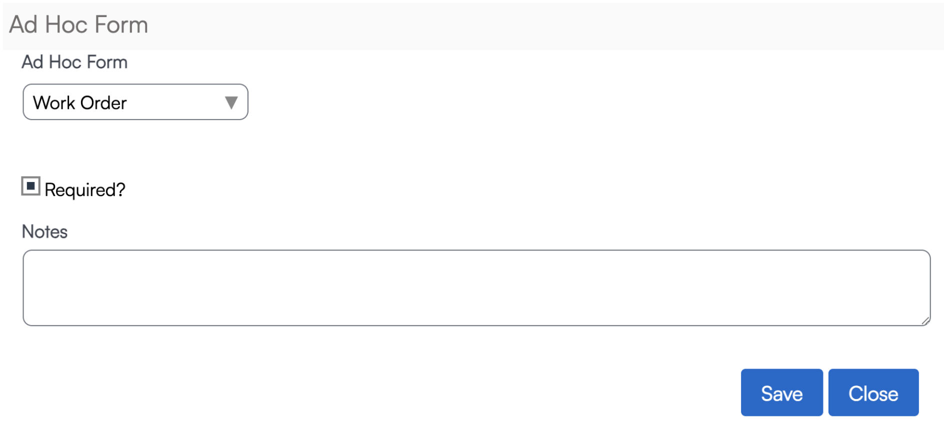



## Add a Form to an Appointment

Once an appointment has been created, locate the **Additional Details** section and select the **Forms** tab. Click **Add.**




The same fields will be available as the Proposal form. Choose from any of your Appointment-kind forms using the dropdown menu. Check the **Required** box if it must be completed during the appointment. The**Notes** field is optional.




Forms will appear on the appointment for the Service Agent to review with the customer. The Finish button will not become available until all required forms are completed.