

Ad Hoc Forms

12/05/2025 11:48 am CST

Overview

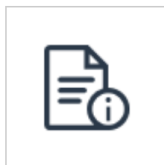
Ad Hoc Forms are customizable, customer-facing documents used to gather signatures. These forms can be added to proposals, appointments, or invoices and are fully viewable and printable by your customers. Because they support shortcodes and basic formatting, Ad Hoc Forms make it easy to present accurate,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

This article will review:

- [Settings and Navigation](#)
- [Create an Ad Hoc Form](#)
- [Using Ad Hoc Forms](#)

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

1						
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

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 compatible 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).

Edit Ad Hoc Form Template

Name*

Work Order

Active?

☐

Kind*

Appointment ▼

Default Required?

☐ On Proposal Accept

Title*

Work Order Agreement

Editor

markdown

shortcodes

```
1 #Amendment to Work Order between {organization.name} and {contact.name}
2
3 This **Amendment** ("Amendment") is made and entered into as of the date last signed below, by and between
4
5 ## Purpose
6 This Amendment modifies the payment terms set forth in the original Work Order between the Parties.
7 Except as specifically amended herein, all other terms and conditions of the Work Order shall remain in full
8
```

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**.

\$800 Bundle new...

Description	Color	Qty	Rate	Amount
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.		1	0.00	\$0.00
Example Part 1		1	100.00	\$100.00
Example Part 2		3	200.00	\$600.00

Add...

Margin 100 %

Slide Deck

Apply...

Internal Notes

Add... When Who

Ad Hoc Forms

Name	Created	Signed	By
Add...			

Audits

When	Action	Who	Where
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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.

Ad Hoc Form

Ad Hoc Form

Proposal Release ▼

☒ Required?

Notes

Please review and sign.

Save Close

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."

IMPORTANT ADDITIONAL INFORMATION

Please carefully review and sign the form(s) listed below. Click on the Name of the form to access it and sign digitally.

Date	Name	Status
12/5/2025	Proposal Release	Signature Required

[Accept...](#)
[Decline](#)
[Request Changes](#)
[Print](#)
[Forward](#)

Add a Form to an Appointment

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

Details

Item	Description	Color
Test Service	Sample description of service.	
<div> <div>Additional Details</div> <div> Map Notes (0) Custom Fields Pictures Videos Documents Audits Forms Checklists </div> </div>		
No data to paginate		
Add...	Required	Created Signed

No data to display

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.

Ad Hoc Form

Ad Hoc Form

Work Order

☐ Required?

Notes

SaveClose

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.

Additional

Proposal Media1 >

Contact Media6 >

Forms

Work Order

Date 12/5/25 >

Required

1 form remaining

Take After Pictures >

Finish >