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ebook

# Your Guide to Creating Professional Custom Forms



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# A Stepping-Stone to even Better Communication



# 1

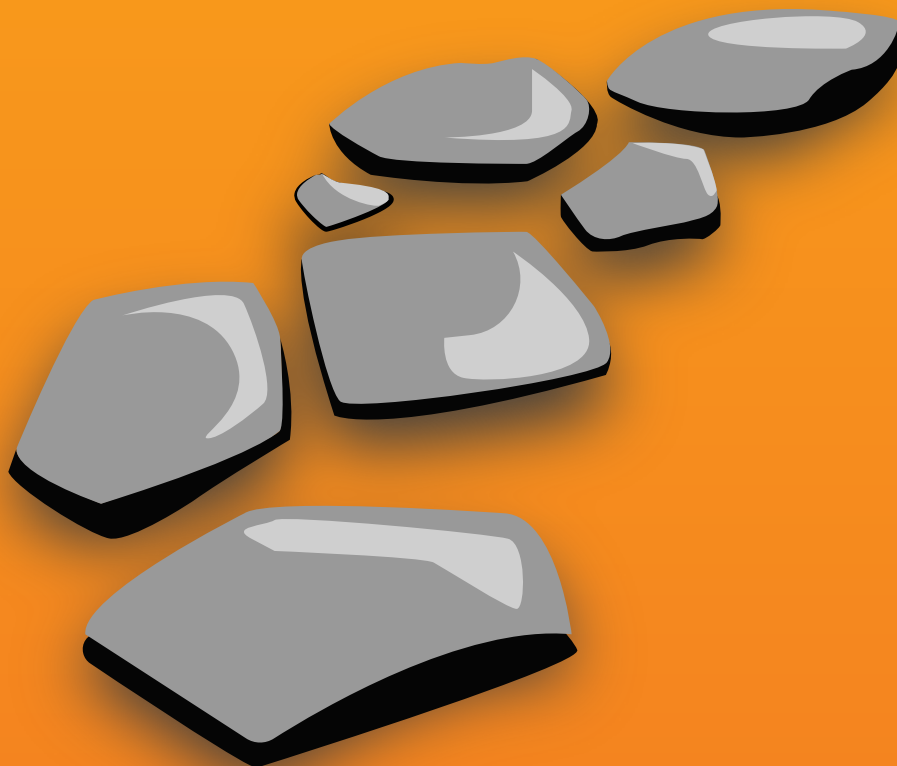
You've seen how software improves the way your service business communicates with your customers; whether it's writing emails that grab their attention or delivering invoices that encourage them to pay on time.

While that's definitely a job well done so far, there can often be other details that slip through the cracks; but fixing these can have a big impact on your business when you get them sorted.

After all: you'll likely have additional, specific needs that industry-standard forms can't meet, so it helps if you can make your own forms that look the part, no matter what.

In this guide, then, we'll take a look at forms, checklists, and the best practices you can follow, alongside a practical template that can help you craft professional-looking forms of your own.

Let's dive in!



# 4 Things to Keep in Mind



# 2

Whether you need industry-standard forms for fire alarms, boiler installations, or other services besides, any good job management software should allow you to implement them digitally. If yours can't, it might be worth looking at one that can.

However, for your own business, you know more custom forms may be needed and so it can help if you keep these four things in mind when it comes to creating your own custom forms.

**1 Digital forms are superior to paper ones.** You save on physical storage, limit the risk of loss, and prevent damage. That said, you may still wish to print a hard copy from time to time, so designing a template that works both digitally and as a printed hard copy, is useful.

**2 Focus on making forms easy to fill out.** Dropdown menus can make filling in a digital form faster, saving time and reducing mistakes vs a paper form. If your forms are created in something like Commusoft, you could use dropdowns, checkboxes, radio boxes, and text fields to make it even easier.

**3 PDFs are the best format to send forms in.** It's a simple thing to keep in mind but it will help you when it comes to saving and sending forms (particularly by email) that are easy to download for just about everyone. PDFs are also difficult to edit after being completed, so there's no need to worry about anyone changing the data when they shouldn't be.

**4 Keep designs simple.** There's a lot of essential information contained on a form, so it's best if they're kept clear and concise. The template on the next page shows a great example of a custom form design.

# Custom Forms - A Guiding Template

# 3

Custom form title

Customer's name/property address

Your company logo

Your business address

If there's a landlord/agent add their address, too

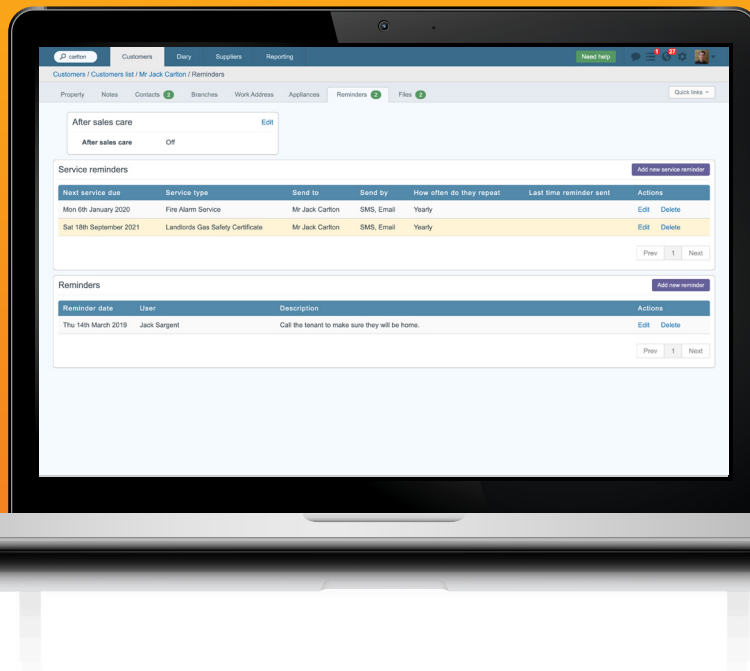
Actionable questions for engineers to answer, plus space for additional notes

The engineer name and signature

Date signed and Issue number (useful for your internal database record keeping)

The customer's name and signature

Document Title		
LOGO		
Registered business	Job address	Landlord/agent
_____ _____ _____	_____ _____ _____	_____ _____ _____
Questions		
_____ <input checked="" type="checkbox"/> _____ <input checked="" type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input checked="" type="checkbox"/> _____ <input type="checkbox"/> _____		
Engineer information	Received by information	Certification information
_____ <i>[Signature]</i>	_____ <i>[Signature]</i>	_____ _____
Document title Registered business: _____ Registered business address: _____		



**If you want to be able to comfortably set up custom forms and deploy them yourself, did you know that Commusoft can help?**

With checklists and forms created within Commusoft, you can get greater control over your workflow and ensure that your engineers are all performing to the same high standards.

[Learn more!](#)



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