



# Custom Forms for Mobile Service

Standardize service workflows and capture documentation directly in Cargas Energy—without relying on paper forms or third-party tools.



## Build Your Own Forms in Cargas Energy

Custom Forms for Mobile Service allows you to build and attach custom service forms to work orders so technicians can complete documentation in the field using the Mobile Service app. Completed forms are automatically stored with the work order and customer account.



### Standardize Service Processes

Build your own checklists and attach them to work orders so technicians follow consistent processes.



### Capture Documentation Automatically

Automatically save completed forms to the work order and customer account.



### Keep Technicians in One System

Allow technicians to complete forms inside the Mobile Service app they already use.



### Reduce Data Entry

Pre-populate form fields with Cargas Energy data so technicians don't have to re-enter information.



### Reduce Software Costs

Eliminate or reduce your need for paper or third-party tools by bringing form functionality into Cargas Energy.



### Enforce Documentation Requirements

Configure work orders so they can't be closed until required forms are completed.

## Get Started with Custom Forms for Mobile Service

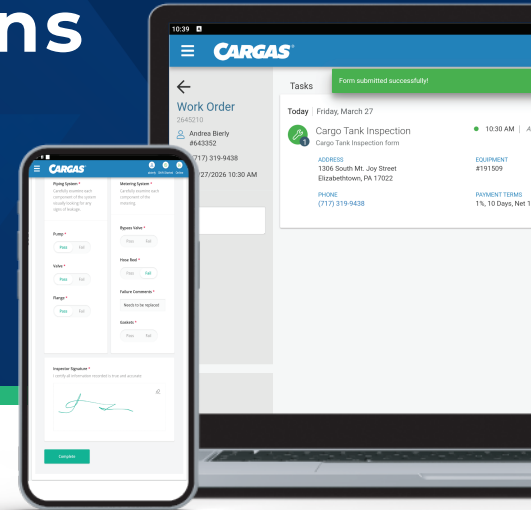
Custom Forms for Mobile Service is now available for Cargas Energy Customers. Contact your account manager to get started.

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[cargasenergy.com/customforms](https://cargasenergy.com/customforms)



# Key Features & Limitations

Create maintenance checklists for service documentation, gas check forms for safety and compliance, and upgrade recommendations to sell services in the home. There are no limits to the forms you can create.



## With Custom Forms, You Can:

- Build custom service forms
- Attach forms to work orders
- Pre-populate form fields with existing Cargas Energy data
- Require form completion before closing jobs
- Store completed forms with work orders and customer accounts
- Complete forms offline
- Customize form field types
- Mark form fields as required or read-only
- Add conditional logic steps
- Customize form layout
- Include HTML formatting
- Capture photos on forms
- Download or email completed forms
- Restrict creation/editing of forms in the setup screen
- Restrict editing of submitted forms
- Query data and run reports on completed forms

## Right Now, Customs Forms Doesn't:

- Function as an e-signature platform
- Work as part of the leak check workflow
- Update Cargas Energy fields based on form responses
- Include pre-built form templates
- Work on non-Android devices



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