Overview

This guide explains how to create agency-specific custom forms. Custom forms allow you to create new custom forms or make changes to an existing custom form.
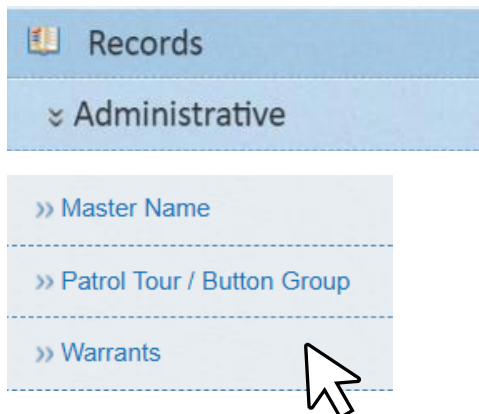
Contents
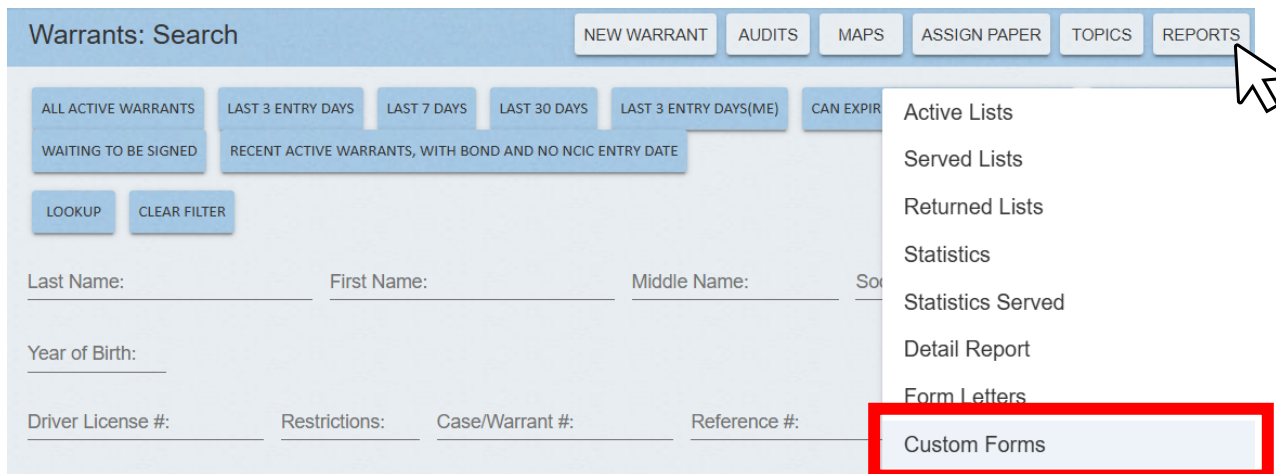
Custom Form Creation Example

We will use the **Warrants** module as an example for creating a custom form, but custom forms are available in numerous modules throughout iSOMS. Simply follow similar steps to repeat this process in other modules.

Navigate to:

RECORDS → ADMINISTRATIVE → WARRANTS

In the upper right, click **REPORTS → CUSTOM FORMS**

This is the screen where you will be able to view, download and upload custom forms. This is also where you will download the Excel model to merge the data with your form.

While on the **Custom Reports** screen, scroll down to the bottom of the page and go to **System** on the grid. In the right corner, click on the **Download Empty Data Model** button and save it on your computer.

All custom forms are built in Microsoft Office Word, which will provide you a familiar and user-friendly environment to create or edit a form. Microsoft Office – Word (2007 or higher with the .docx extension) is required to create or edit any custom forms. Once this form is merged with the provided Excel Sheet, it can be uploaded into iSOMS and will be ready to use.

When completing a custom form for iSOMS, it will be treated as a mail merge.

There are two parts to a mail merge that are required:

1. The Word document (Form or Letter, created or edited by you)
2. The Excel Sheet or Model (Provided for you from iSOMS)

Excel Model

The Excel Model that is provided for you needs to be downloaded and saved to your local computer to make it available for the merge. The Merge Data Fields are necessary to create a placeholder in the form to add the data from iSOMS.

This is a very important step in creating a custom form that will merge with iSOMS data. There are a few steps to follow to download the Excel model.

1. You must have a warrant or record open in iSOMS. (It does not matter what record is open.)

2. Next you will go to the upper right and click **REPORTS → CUSTOM FORMS**

3. Once on the Custom Reports screen, scroll to the bottom of the screen. Here you will notice a box that says **Report Format.** Choose **Excel**, and then click the **Download** button below it.
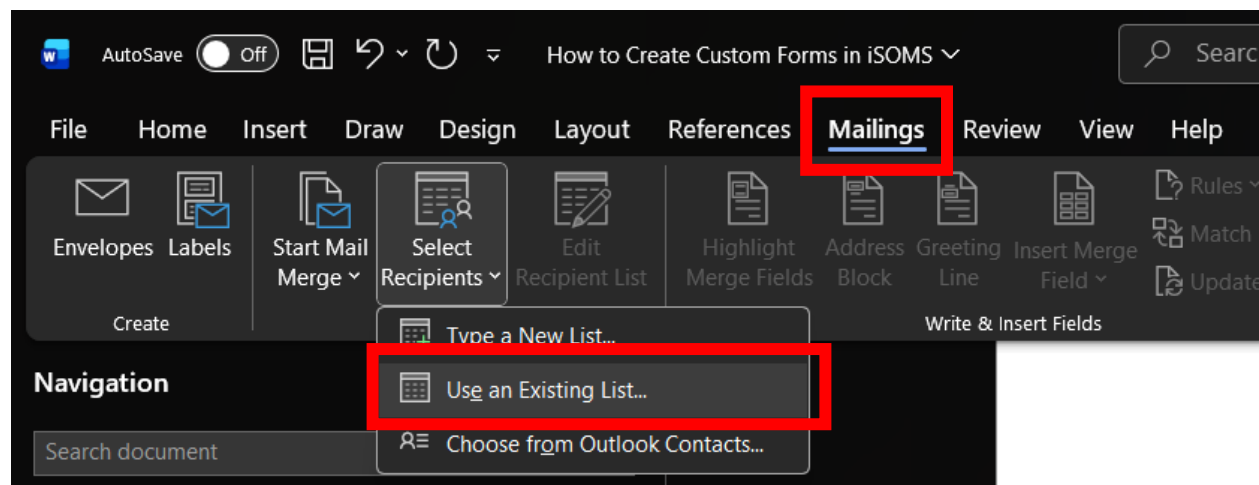

4. Once the file has been downloaded, open the file in Excel. (We suggest you create a new folder on your desktop or elsewhere on your computer that is easy to find where you can save this and all other forms you create.
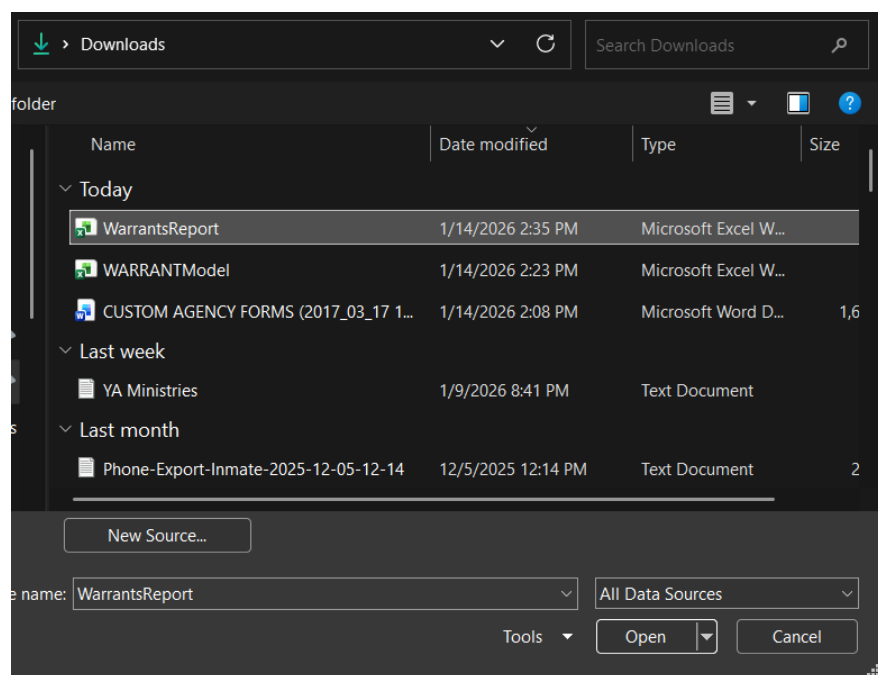
Microsoft Word

Now open Microsoft Word. Open an existing form, or you may create your own from a blank document.

First, in the top menu, go to **Mailings → Select Recipients → Use an Existing List**.

This will open a search box on your computer. Navigate to the folder and Excel model / file you saved from iSOMS.
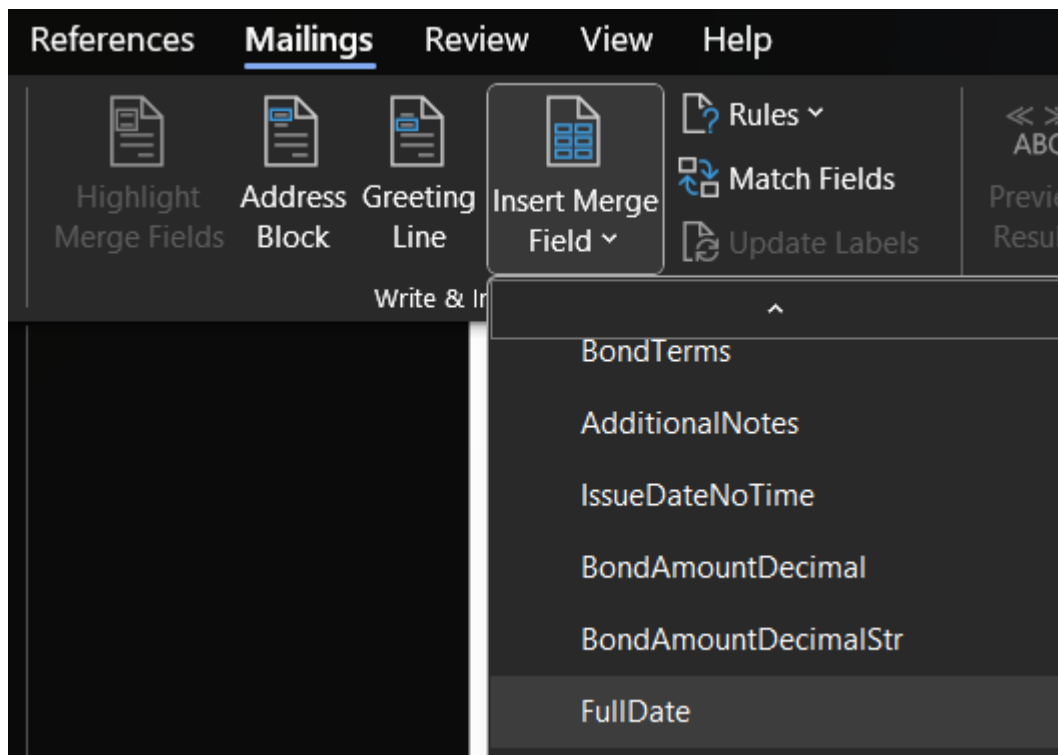

Once you choose it, Word attaches it to your document and unless you move the form to another location or to another computer. You should now be ready to add the data fields needed for the merge.

Adding Data Fields

To add data fields to this Word document, you will place your cursor in the document where you want the data:
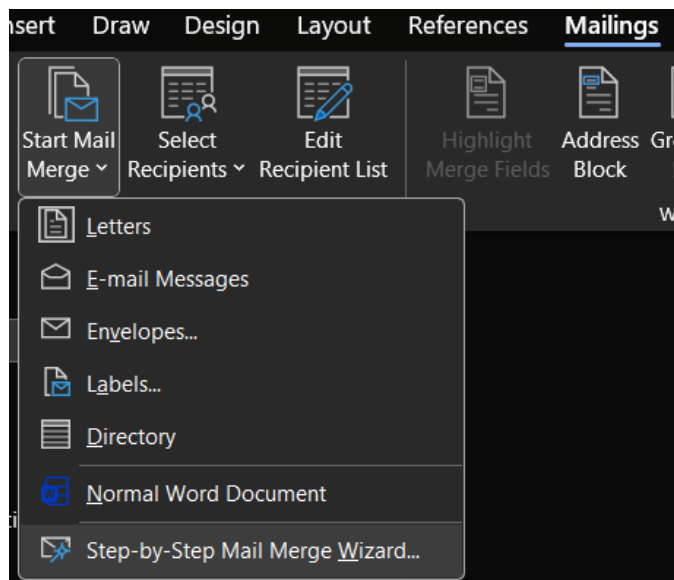
PROGRAM | GRADE | DATE | TIME

Section Title

Now go to **Mailings → Insert Merge Field** and scroll down the list to find the appropriate data field. (Agency Name, Agency Address, etc.)

References   Mailings   Review   View   Help

Highlight Merge Fields | Address Block | Greeting Line | Insert Merge Field ˅ | Rules ˅ | Match Fields | Update Labels | Preview Result

Write & I

BondTerms

AdditionalNotes

IssueDateNoTime

BondAmountDecimal

BondAmountDecimalStr

FullDate

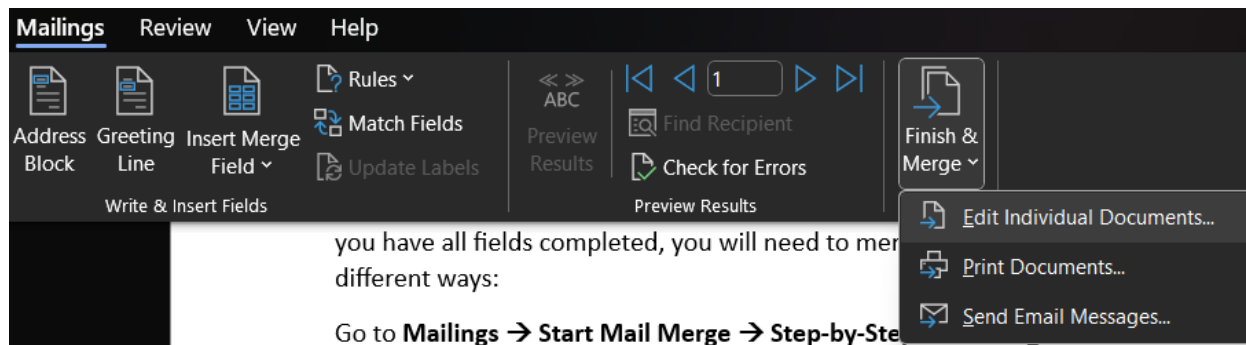PROGRAM | GRADE | «FULLDATE» | TIME

Section Title

Now go through your letter or form and add all the fields you wish to auto-fill from iSOMS. Once you have all fields completed, you will need to merge the document. This can be done two different ways:

One, go to **Mailings → Start Mail Merge → Step-by-Step Mail Merge Wizard**.

This will bring up a dialog in the bottom right corner of your document, and you can click through until you get to the appropriate merge option.

Or two, you can also click on **Finish & Merge** on the menu.

Either way, choose Letter. Once they are merged, you need to save the document and name it so it is easily understood for those who will be using it in iSOMS. Storing the original on your computer will allow you to edit or add to the document any time you need to.

After viewing the form, it can be printed or downloaded to type in additional information if needed.

Example:

The screen shot below shows a custom letter being created using a basic letter format. The information that I want to pull from iSOMS are in bold. These are the areas that will be used from the Excel sheet that was selected earlier.

To:

Re:

Scheduled Date:

Print Date:

Dear Probationer:

You were placed on probation with **Agency** Probation Services in **Judges Name** court. As of the above date you missed your last scheduled appointment with my office.

This letter is to inform you that you are in violation of your probation. I have rescheduled your appointment for **Next Appt. Date** between 8:00 am and 4:00 pm. As of the date of this letter, you have a total open balance of **Total Fees** which is payable in either cash or money order.

Failure to report on or before the above date will result in a Probation Violation Warrant being issued. You must inform our office of any changes in your address or phone number. If you have any questions regarding this letter, please call the office at **Agency Phone Number**.

Merge Field

Insert Merge Field ? X

Insert:
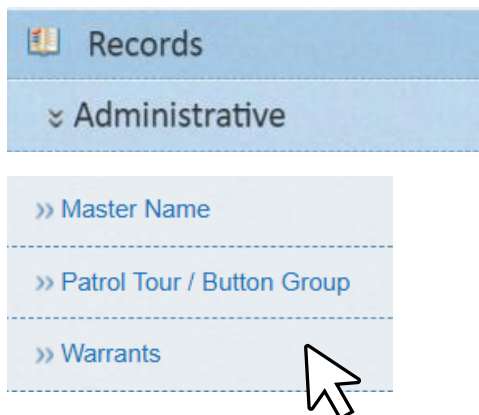○ Address Fields ● Database Fields

Fields:

Agency
Agency_Name
Agency_Address1
Agency_Address2
Agency_City
Agency_State
Agency_ZipCode
Agency_Phone
Agency_Fax
Agency_County
Agency_StateName
Agency_StateNameCased
Agency_CityCased
Agency_CSZ
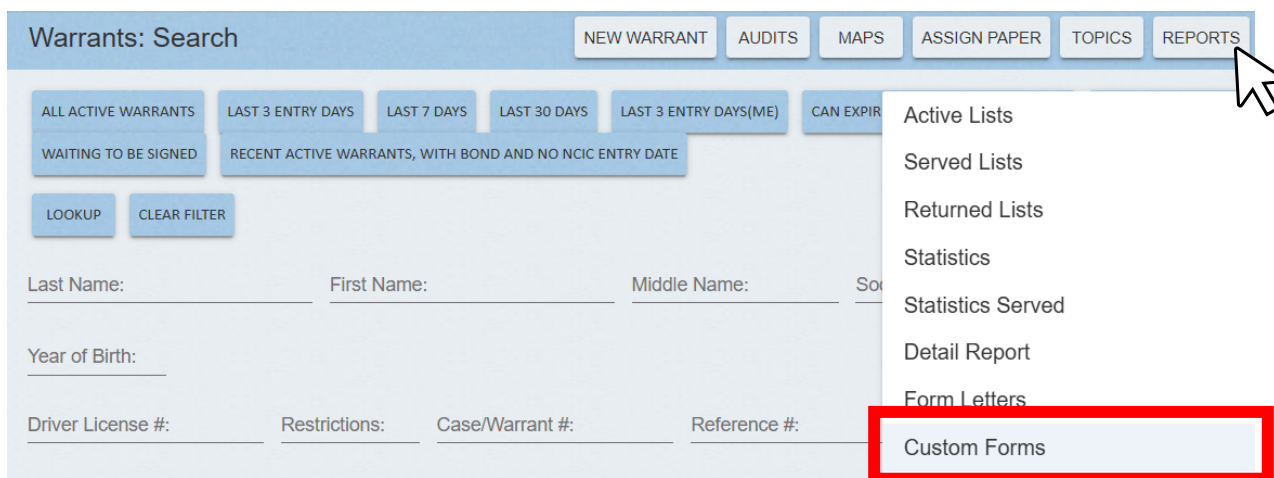Agency_Admin

Match Fields...   Insert   Cancel

Uploading the Document to iSOMS

Now we will upload the Word document to iSOMS. Navigate to:

RECORDS → ADMINISTRATIVE → WARRANTS

In the upper right, click **REPORTS → CUSTOM FORMS**

While on the **Custom Reports** screen, scroll down to the bottom of the page and go to **Custom** on the grid. In the right corner of custom, click **Add Custom Form**

Now add the **Report Name,** any **Notes,** and upload the file that you created as detailed in this guide.

Finished Word Document

YOUR AGENCY
100 MAIN STREET
MARYVILLE, TN 37803
(865)-380-4600

ABBOTT, STANLEY WAYNE
3248 ABBOTT RD
MARYVILLE,TN

Re: Missed Appointment
Scheduled Date:

Print Date: 03/16/2017 15:52

Dear Probationer:

You were placed on probation with **YOUR AGENCY** Probation Services in court. As of the above date you missed your last scheduled appointment with my office.

This letter is to inform you that you are in violation of your probation. I have rescheduled your appointment for between 8:00 am and 4:00 pm. As of the date of this letter, you have a total open balance of **$0.00** which is payable in either cash or money order.

Failure to report on or before the above date will result in a Probation Violation Warrant being issued. You must inform our office of any changes in your address or phone number. If you have any questions regarding this letter, please call the office at **(865)-380-4600**.

Sincerely,

For More Information

We hope this manual has been helpful to you and your agency.

If you have any questions, don't hesitate to call us at 888-644-5786.

First Revision, January 2026