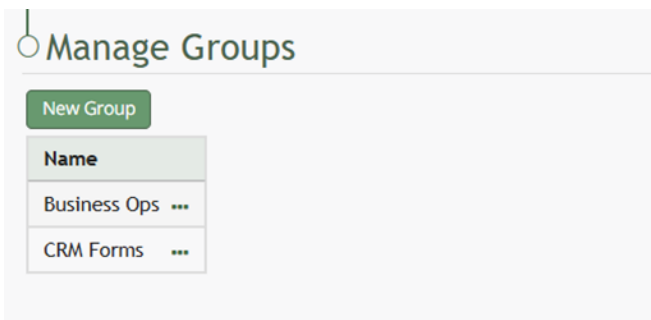


Add Forms to a Group

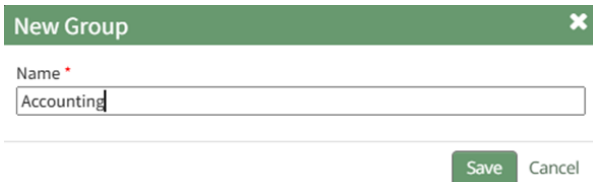
In order for forms to be placed into groups, form groups have to be created first.

How To: Add a Forms Group

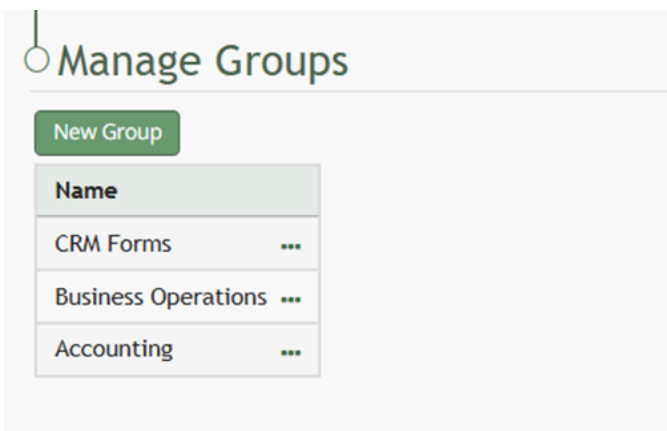
To add a group in the Forms Module, select Groups on the Main Menu and go to the Manage Groups Page in the Forms Module.



Select the “New Group” button opening the New Group Modal. Input the name of the new group.



Select “Save” and the new group will now show in the Form Groups Table on the Manage Groups Page.



Forms Home

Manage Forms

Create Form Convert Database to Form Create Group

Filter All but archived Show forms in groups Hide empty groups Collapse All Expand All

- Business Operations

Title	Status	Drafts	Entries	Pending Approval
No records found.				

- CRM Forms

Title	Status	Drafts	Entries	Pending Approval
+ CRM Chatter	Live	0	4	0
+ CRM Companies	Live	0	175	0
+ CRM Lead Sources	Live	0	9	0
+ CRM Leads	Live	0	168	0
+ CRM Opportunities	Live	0	7	0
+ CRM Touches	Live	0	246	0

- (Ungrouped)

Title	Status	Drafts	Entries	Pending Approval
+ KAStack Modules	Not Live - Preview Mode	0	24	0
+ CRM To Dos (Kanban)	Not Live - Preview Mode	0	43	0
+ Manual Stages and Parameters	Not Live - Preview Mode	0	11	0

When groups have been added to the Forms Module, the Forms Table on the Home Page is broken into different sections for each group.

To place forms into groups, drag the form by the directional arrow to the left of the Form Title into the desired Group Table.

Forms Home

Manage Forms

Create Form Convert Database to Form Create Group

Filter All but archived Show forms in groups Hide empty groups Collapse All Expand All

- Business Operations

Title	Status	Drafts	Entries	Pending Approval
+ CRM To Dos (Kanban)	Not Live - Preview Mode	0	43	0

- CRM Forms

Title	Status	Drafts	Entries	Pending Approval
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- (Ungrouped)

Title	Status	Drafts	Entries	Pending Approval
+ KAStack Modules	Not Live - Preview Mode	0	24	0
+ Manual Stages and Parameters	Not Live - Preview Mode	0	11	0

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