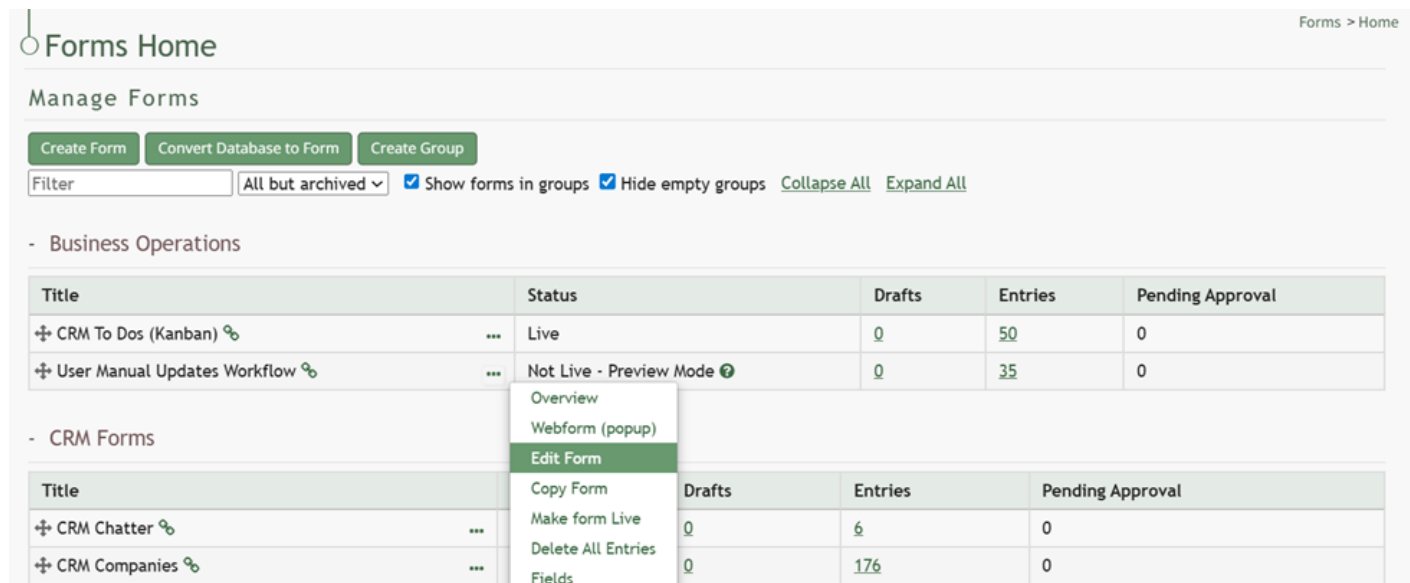


Add Forms to the Forms Module Summary Widget

To add a specific form so that it is displayed on specific user's the Forms Module Summary dashboard widget, go to the Form you want included on the Home Page of the Forms Module. Select the three-dot icon opening the Forms context menu.



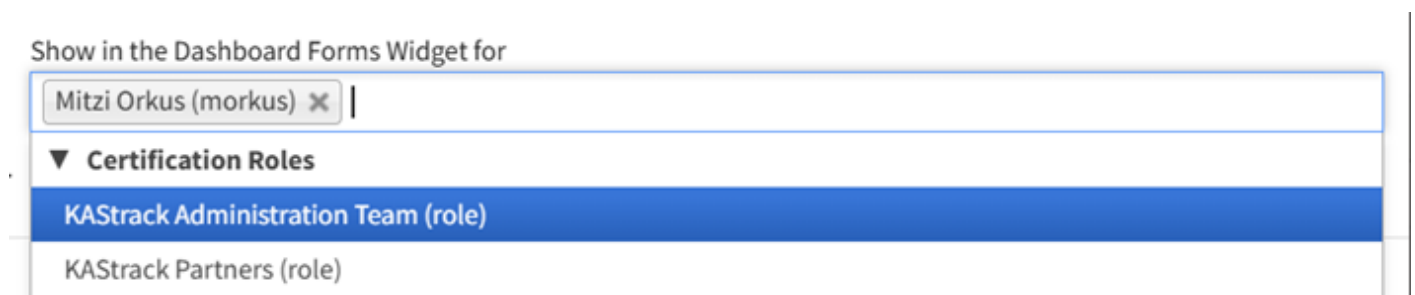
The screenshot shows the 'Forms Home' page with a 'Manage Forms' section. It includes buttons for 'Create Form', 'Convert Database to Form', and 'Create Group'. There are filter options and checkboxes for 'Show forms in groups' and 'Hide empty groups'. The page is divided into sections: 'Business Operations' and 'CRM Forms'. The 'CRM Forms' section has a table with columns for Title, Status, Drafts, Entries, and Pending Approval. A context menu is open for the 'CRM Companies' form, showing options like 'Overview', 'Webform (popup)', 'Edit Form', 'Copy Form', 'Make form Live', 'Delete All Entries', and 'Fields'. The 'Edit Form' option is highlighted.

Title	Status	Drafts	Entries	Pending Approval
CRM To Dos (Kanban)	Live	0	50	0
User Manual Updates Workflow	Not Live - Preview Mode	0	35	0

Title	Drafts	Entries	Pending Approval
CRM Chatter	0	6	0
CRM Companies	0	176	0

Select "Edit Form" opening the Edit Form Modal and go to the Advanced Settings section.

Input the users or certification roles you wish to see the selected form in their Dashboard Forms Module Summary Widget.



The screenshot shows a dialog box titled 'Show in the Dashboard Forms Widget for'. It contains a search bar with 'Mitzi Orkus (morkus)' entered. Below the search bar, there is a section for 'Certification Roles' with a dropdown arrow. The roles listed are 'KAStack Administration Team (role)' (highlighted in blue) and 'KAStack Partners (role)'.

Select "Save" and the form will now be visible on the dashboard to the selected users.

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