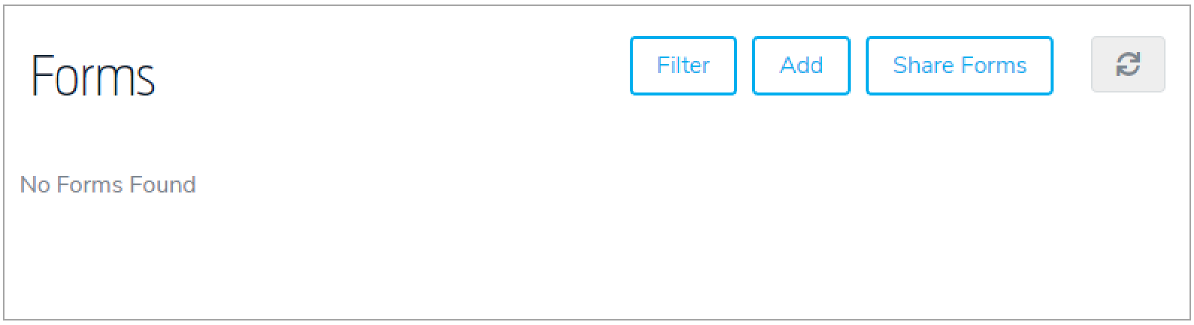
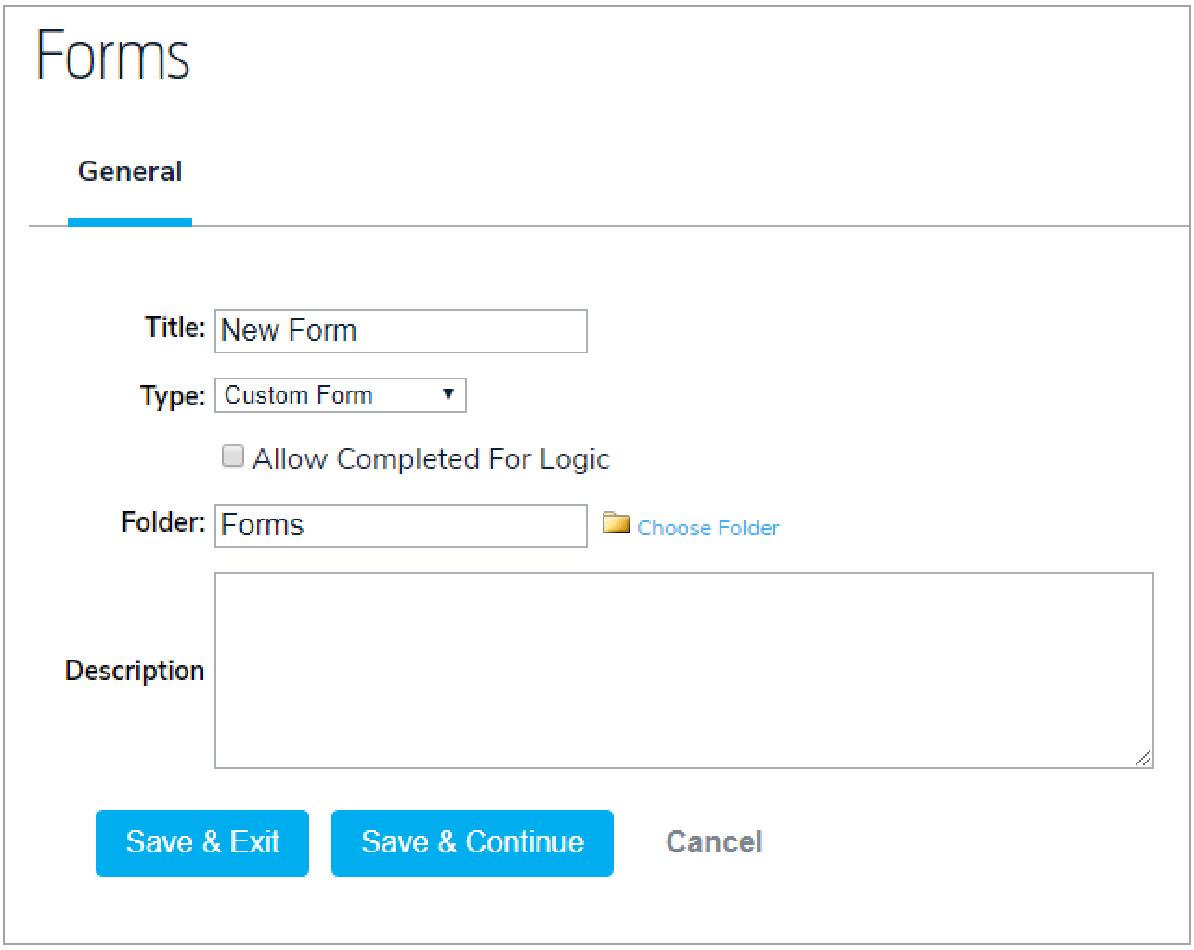
Create a Form

1. To create a form, click the Forms icon in the navigation bar, then click Add.



2. Enter a name for the form in the Title field.
3. Select Custom Form, Plan - Event Editor, or Relationship Editor from the Type dropdown menu.



4. If you selected the Custom Form type and you wish to allow users to complete the form on behalf of someone else or for a resource, select the Allow Completed For logic checkbox.
5. Enter any additional information about the form in the Description field.
6. Click Save & Continue to display the additional configuration options (Design, Assigned Forms, Completed Forms, Relationships, Shares, and Properties).