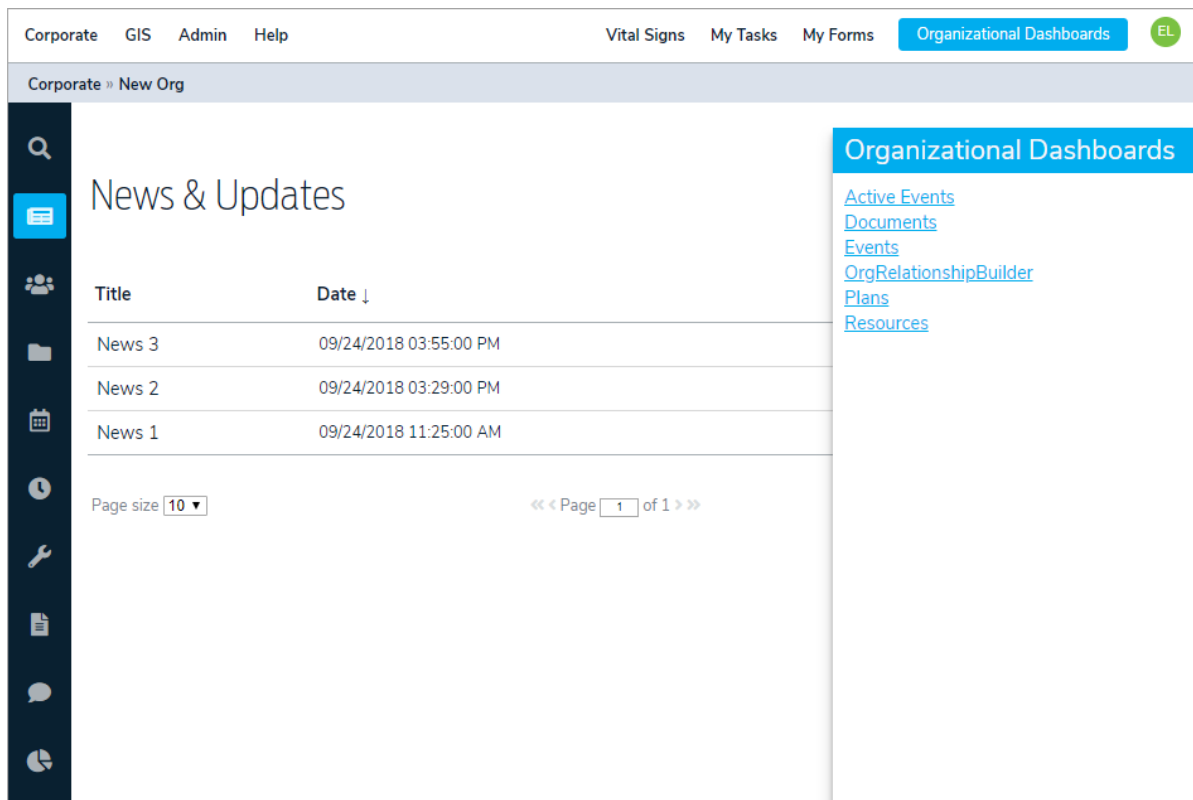# Relationship Builder

The **relationship builder** is a tool that can be added to Organization Editor or Plan-Event Editor (dashboard) forms, and allows users to create scoped relationships directly from the form. Administrators can select the type of objects the relationship is created between, if one or both of the objects come from within or outside the current org, and the type of relationship.

To add a relationship builder tool to a dashboard form, see the Create an Organizational Dashboard and Create a Plan or Event Dashboard articles. See the Advanced Relationship Mapping article for information on defining which form is displayed for each item and relationship type.

To use the relationship builder tool on a dashboard form:

1. Click the **Organizational Dashboards**, **Plan Dashboards**, or **Event Dashboards** link at the top-right of the page to display the dashboard panel.

2. Click the link to the form that contains the relationship builder tool.

The Organizational Dashboards panel.

3. Click the text box on the right of the top row and enter keywords to search for and select an object or click the [icon] icon to the right of the field to display the **Association Tree**, then select an object. Depending on the configurations made by an administrator, you may or may not be able to select an object outside the current organization.

The relationship builder on a form.

4. If more than one relationship type was added to the tool by an administrator, select the relationship type from the **Relationships** dropdown menu.

5. Click the text box on the left of the top row and enter keywords to search for and select an object or click the

   icon to the right of the field to display the **Association Tree**, then select an object. Depending on the configurations made by an administrator, you may or may not be able to select an object outside the current organization.

A relationship on the form that has not yet been saved.

6. Click the icon to save the relationship.

> Enabling **Auto Refresh** on the form will clear any unsaved selections in the relationship builder.

7. The relationship builder will create a new Relationship Editor form and prompt the user to enter in the required information.

8. Click the icons to swap the objects in the relationship, delete the relationship, or view more information.