

Forms

A form displays organized fields from a record. There are multiple ways to access forms. By using Global Search, or by selecting a record in a list. Notice which fields you can edit or not edit, which sections are available for posting work notes or comments, and which lists are related to the record you're viewing. From the form header, you can navigate between different records, add attachments, access the form context menu, and so much more! You also learned about all the different field types you'll see in the Platform. Create templates, add, or update records, and always remember to save your work. It's now time to go play around in a form in the next activity!