

Configuring the Applied Object Type Form for Playbooks Automation

Last Modified on 02/13/2025 10:00 am EST

Overview

When a user creates a Playbook Automation rule, they must select an object type that the Playbook Automation rule will be applied to. Additional configuration of the applied object type form is required to ensure it is ready to be used with playbooks.

User Account Requirements

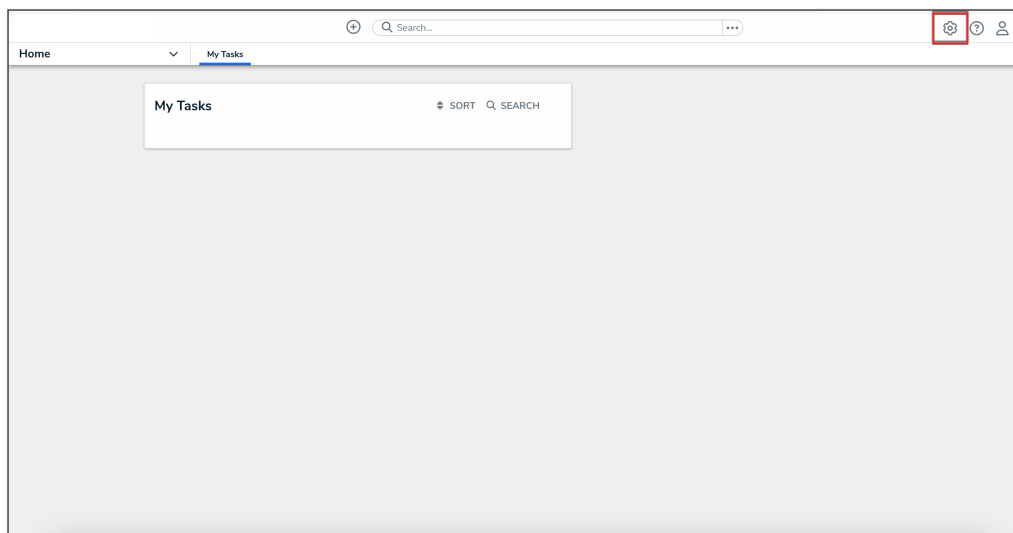
The user account you use to log into Resolver must be an Administrator to edit forms.

Related Information/Setup

Please refer to the [Playbooks Automation](#) section for more information on using playbooks in Resolver.

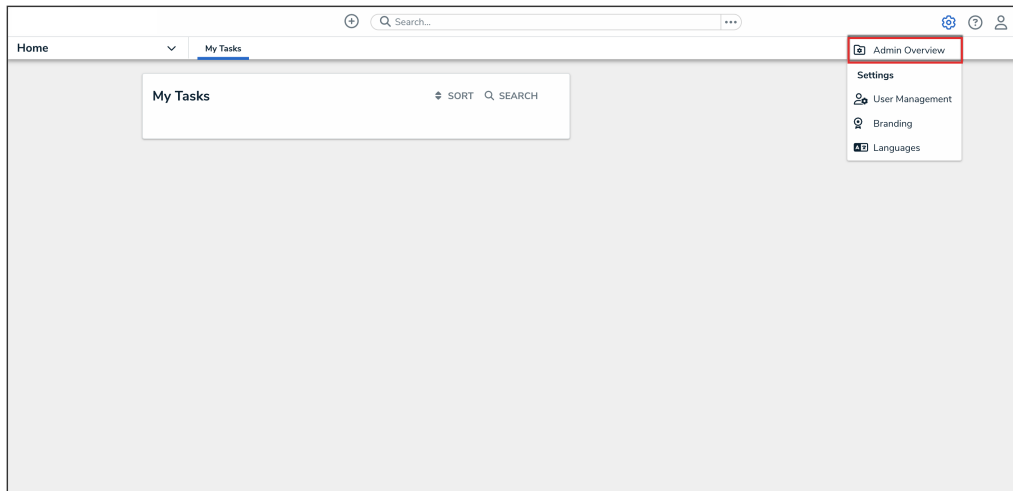
Navigation

1. From the **Home** screen, click the **Administration** icon.



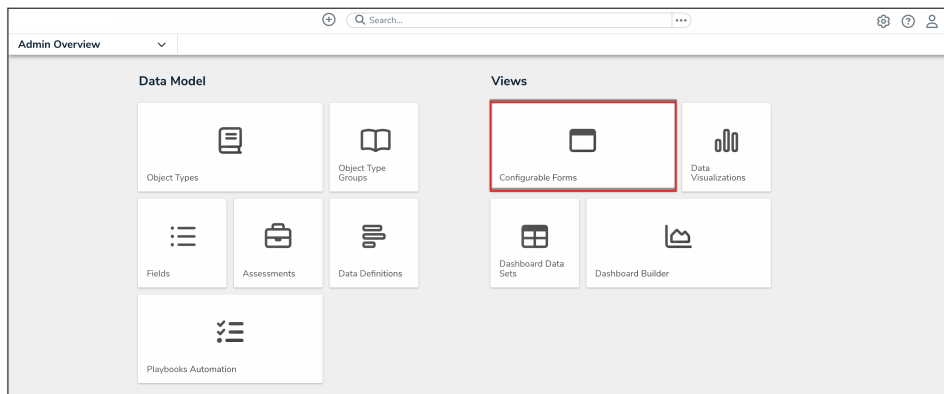
Administration Icon

2. From the **Administrator Settings** menu, click **Admin Overview**.



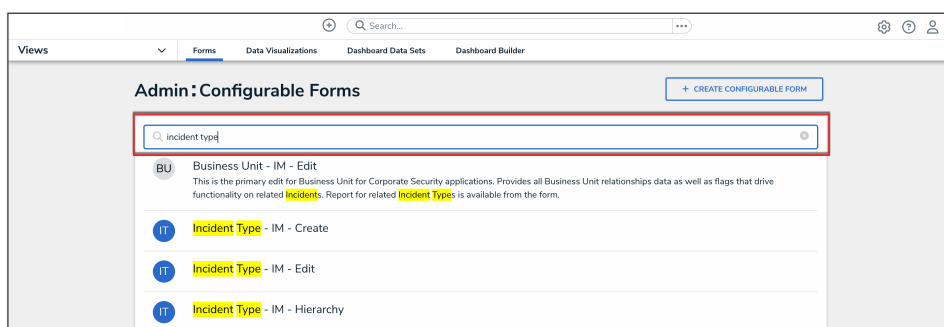
Administrator Settings Menu

- From the **Admin Overview** screen, click the **Configurable Forms** tile under the **Views** section.



Configurable Forms Tile

- From the **Configurable Forms** screen, enter a form name for the applied object type you selected for the Playbook Automation rule in the **Search** field.



Search Field

- Click the form that you want to edit.

Configuring the Applied Object Type Form

1. From the **Relationships** section in the **Form Elements** panel, drag and drop the **Playbooks to Apply** relationship to an existing or new section on the form.

The screenshot shows the 'Admin: Edit Configurable Form' interface. The 'Form Elements' panel on the right is open, and the 'Relationships' section is selected. The 'Playbooks to Apply' relationship is highlighted with a red box. The main form area shows a 'Form Layout' with three options: '1 COLUMN', 'LEFT SIDEBAR', and 'RIGHT SIDEBAR'. The 'Object Name' field is at the bottom.

Playbooks to Apply Relationship

2. From the **Relationships** section in the **Form Elements** panel, drag and drop the **Playbooks Used** relationship to an existing or new section on the form.

The screenshot shows the 'Admin: Edit Configurable Form' interface. The 'Form Elements' panel on the right is open, and the 'Relationships' section is selected. The 'Playbooks Used' relationship is highlighted with a red box. The main form area shows a 'Form Layout' with three options: '1 COLUMN', 'LEFT SIDEBAR', and 'RIGHT SIDEBAR'. The 'Object Name' field is at the bottom.

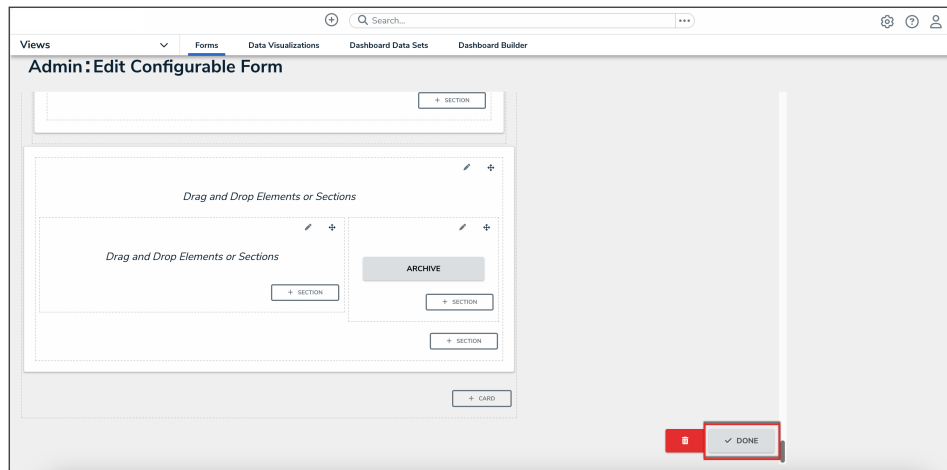
Playbooks to Apply Relationship

3. From the **Actions** section in the **Form Elements** panel, drag and drop the **Apply Playbooks** action to an existing or new section on the form.

The screenshot shows the 'Admin: Edit Configurable Form' interface. The 'Form Elements' panel on the right is open, and the 'Actions' section is selected. The 'Apply Playbooks' action is highlighted with a red box. The main form area shows a 'Form Layout' with three options: '1 COLUMN', 'LEFT SIDEBAR', and 'RIGHT SIDEBAR'. The 'Object Name' field is at the bottom.

Apply Playbooks Actions

- Click the **Done** button to save your changes.



Done Button