



# QUICK REFERENCE GUIDE

# **Adding Reference Links**

The **Reference Links** panel allows users to link multiple related form types together for ease in tracking documents that pertain to each other. Once created the link is a dual link for both form types.

Create a Reference Link for a New Form Record Create a Reference Link to an Existing Record Remove a Reference Link Related Resources

#### Create a Reference Link for a New Form Record

- 1. In the *Reference Links* panel of a record, click the **New** button.
- 2. Click Create New.

A Project	Date 7/12/23 Account Code			Make Private Post
Forms	WORKFLOWS		Start New	Cretta Maine Private — 7/20/23 4:28 PM @Betty Baker Ensure all documents get updated. We will need an addendum to attach to the contract.
Files	• ATTACHMENTS		Download All New +	Ciretta Maine  7/20/23 4:22 PM Circle Vill you please distribute this information to the team?
Photos Reports	Name Contract.pdf 103 KB	Last Updated Loretta Maine (ProjectTeam, Inc.) 7/19/23 at 10:52 AM	•	Loretta Maine
Directory	Project Specifications.pdf 311 KB	Loretta Maine (ProjectTeam, Inc.) 7/19/23 at 10:52 AM	v	REFERENCE LINKS
1				Create New Add Existing

- 3. The Create New Reference Link modal window opens.
- 4. Select the form type and click the **Next** button located on the bottom right corner of the screen.

	Crea	New Reference Link	×
0	lefore creating your new form, choose a form type from the list.		
Sear	h Q		
$\bigcirc$	Punch List Items	System	
	Requests For Information	System	
0	Requests For Proposal	System	
$\bigcirc$	Specification Packages	System	
$\bigcirc$	Submittal Packages	System	
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- 5. The form selected in the previous step will open. Complete all \*Required fields and any other fields necessary and **Save** the record.
- 6. The linked record will be displayed in the *Reference Links* panel of the new record.

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#### Create a Reference Link to an Existing Record

- 1. In the *Reference Links* panel of a record, click the **New** button.
- 2. Click Add Existing.

<b>A</b> Project	Date 7/12/23 Account Code			Make Private Post
Forms	WORKFLOWS		Start New	Coretta Maine     7/20/23 4:28 PM     Privats
Files	S ATTACHMENTS		Download All New -	Loretta Maine     7/20/23 4:22 PM      Grindy Carter Will you please distribute this information to the team?
Photos	Name Contract.pdf 103 KB	Last Updated Loretta Maine (ProjectTeam, Inc.) 7/19/23 at 10:52 AM		Loretta Maine 7/20/23 4:18 PM The Substantial Completion Date has been determined and posted.
Reports	Project Specifications.pdf 311 KB	Loretta Maine (ProjectTeam, Inc.) 7/19/23 at 10:52 AM	•	REFERENCE LINKS     Now -
Cəlendər		Drag and drop to upload or browse computer		Search Create New Add Existing Request FOR INFORMATION • Paint Color - Lobby Request FOr Information

3. The *Add Reference Links* modal window will open. Scroll, use the **Search** feature, or **Advanced Search** (see below) to find the form to link.

5. Click **Add** from the bottom of the modal window.

			Add reference links	
Spec	:		Q	Q Advanced Sear
	Туре	Subject	Created by	Created On
<b>~</b>	Specification	099123 - Interior Painting	Loretta Maine (ProjectTeam, Inc.)	7/21/23 at 2:49 PM
	Specification	General	Loretta Maine (ProjectTeam, Inc.)	7/21/23 at 11:07 AM
Canc	:el			

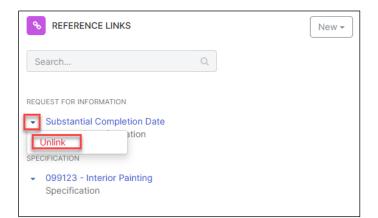
		click the <b>Advanced Search</b> bu	
pec		Q	Q Advanced S
Type	Subject	Created by	Created On
Specification	099123 - Interior Painting General	Loretta Maine (ProjectTeam, Inc.) Loretta Maine (ProjectTeam, Inc.)	7/21/23 at 2:49 PM 7/21/23 at 11:07 AM
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2. Click th 3. Enterin 4. Click th 5. Once f 6. Click A	ng the search criteria ne <b>Search</b> (magnifyir ound, click the check dd from the bottom	a. ng glass) icon. kbox to select the form. of the modal window.	

## Remove a Reference Link

A Reference Link between two records can be Unlinked from either of the records. It will be removed from the Reference Link panels of both record.

1. Open one of the linked records.

- 2. Click the dropdown arrow on the left side of the Reference Link.
- 3. Select Unlink.



### **Related Resources**

- Help Center Links
- Workflow QRG
- Quick Reference Guides (QRGs) and Training Videos
  - o Adding Attachments
  - o Making Comments
  - Creating RFIs
  - Creating Submittals
  - Creating Drawings and Packages
  - Creating Meeting Minutes
  - Creating Daily Reports
  - Creating Punchlists