



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](#)

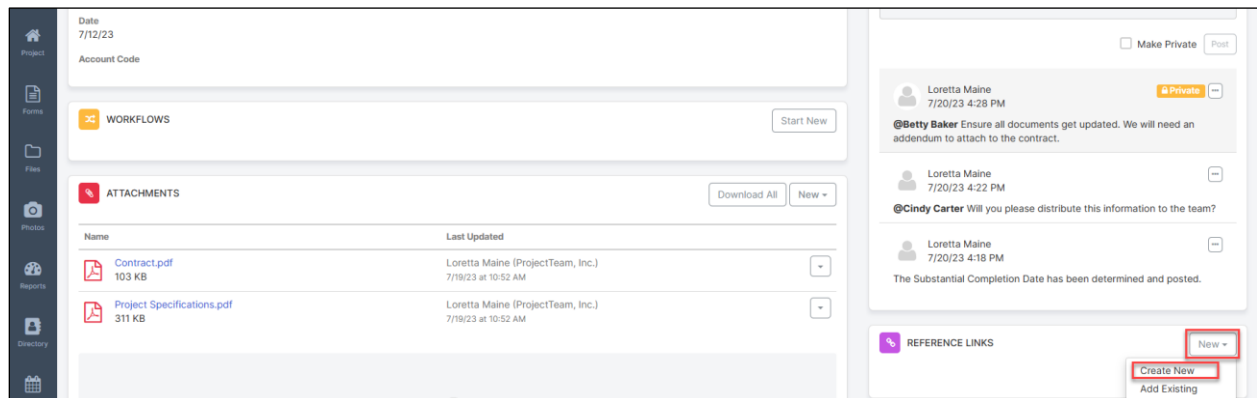
[Create a Reference Link to an Existing Record](#)

[Remove a Reference Link](#)

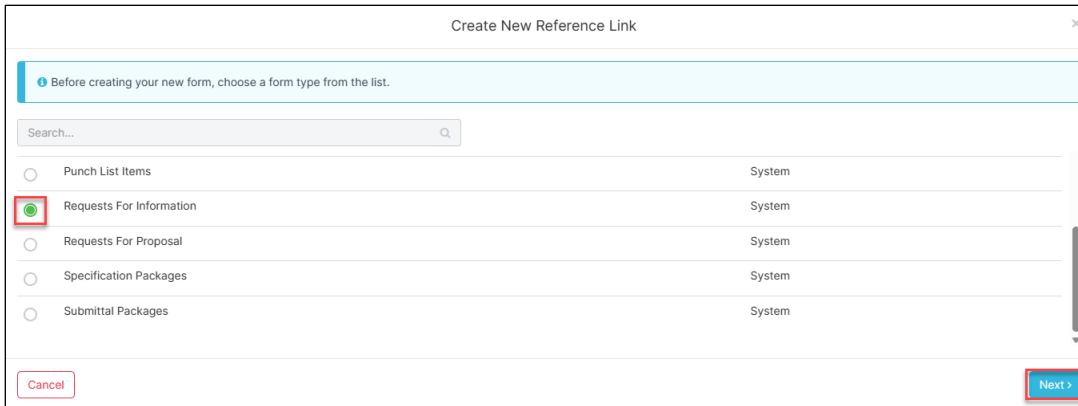
[Related Resources](#)

Create a Reference Link for a New Form Record

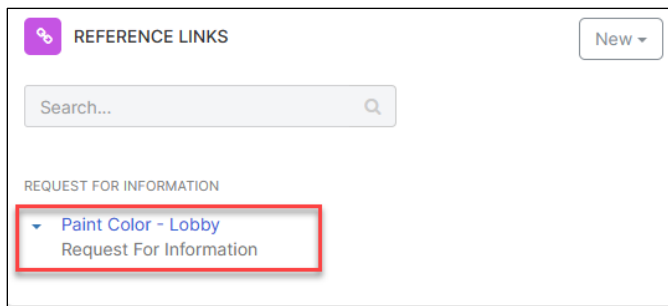
1. In the *Reference Links* panel of a record, click the **New** button.
2. Click **Create New**.



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.

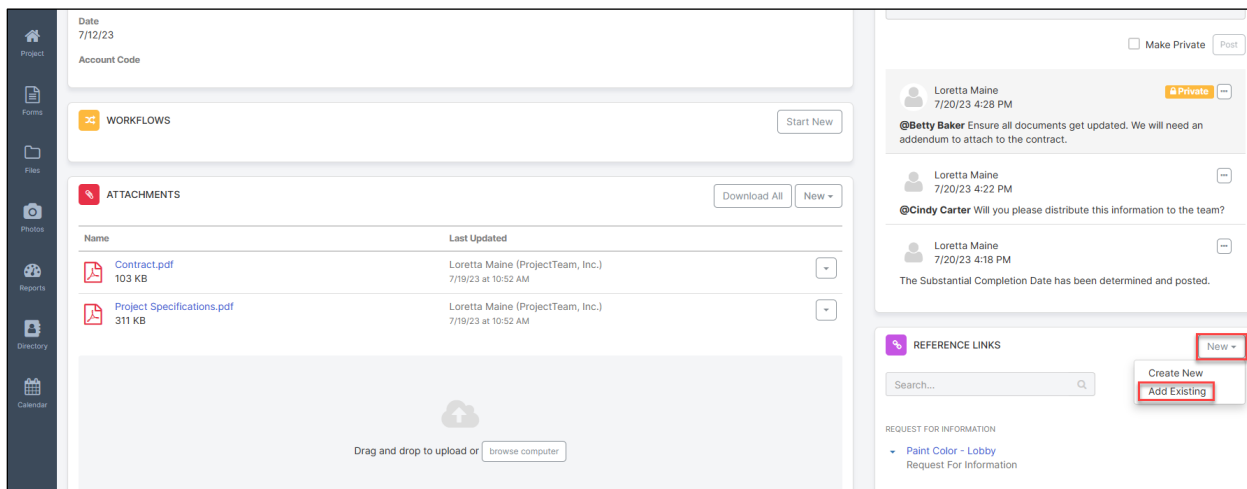


5. The form selected in the previous step will open. Complete all *Required fields and any other fields necessary and **Save** the record.
6. The linked record will be displayed in the *Reference Links* panel of the new record.



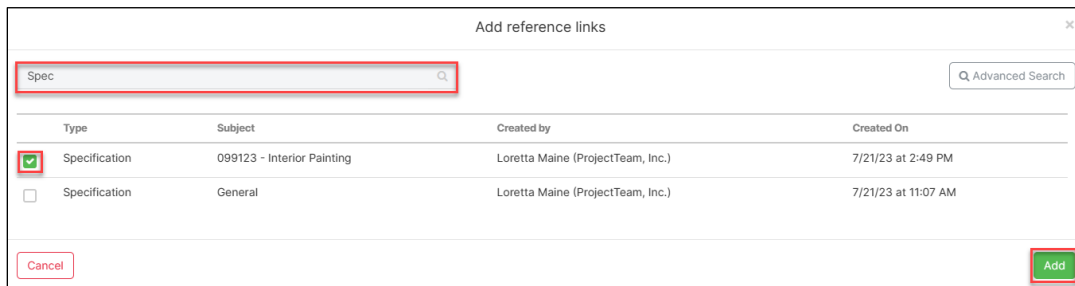
Create a Reference Link to an Existing Record

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



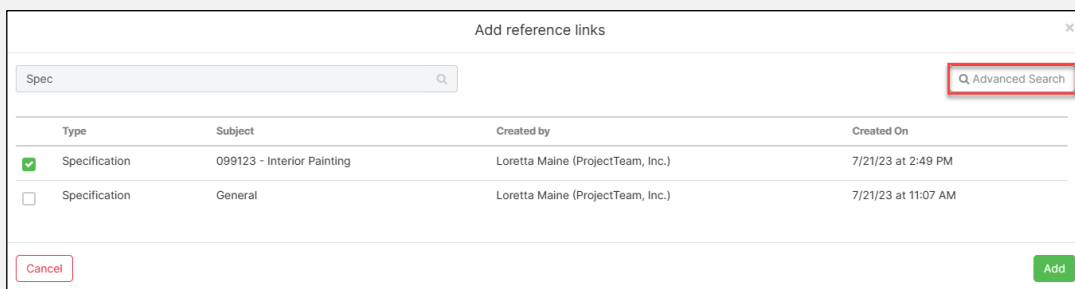
3. The *Add Reference Links* modal window will open. Scroll, use the **Search** feature, or **Advanced Search** (see below) to find the form to link.

4. Once found, click the checkbox to select the form.
5. Click **Add** from the bottom of the modal window.

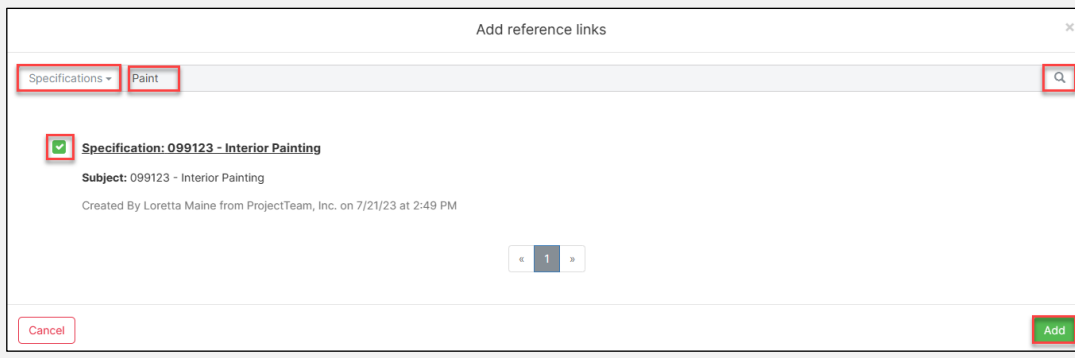


Advanced Search to find the form to link to.

1. To filter by the form type, click the **Advanced Search** button.



2. Click the **All** dropdown and select the form type.
3. Entering the search criteria.
4. Click the **Search** (magnifying glass) icon.
5. Once found, click the checkbox to select the form.
6. Click **Add** from the bottom of the modal window.

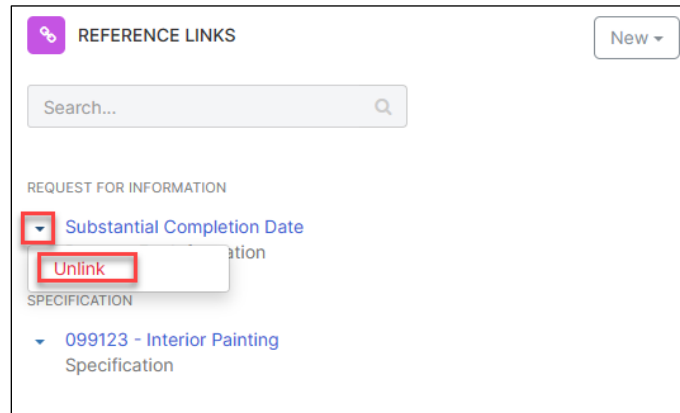


Remove a Reference Link

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
 - Adding Attachments
 - Making Comments
 - Creating RFIs
 - Creating Submittals
 - Creating Drawings and Packages
 - Creating Meeting Minutes
 - Creating Daily Reports
 - Creating Punchlists