

Recommended Process for Creating Applications

To create an application as quickly and easily as possible, Resolver recommends that administrators follow the process outlined below:

1. Create **users** , **user groups** , and **roles** .
2. Create an **application** .
3. Create an **activity** : Enter the activity's name and description.
4. Create **object types** : Enter the object type's name(s), description, and configure its monogram and icon.
5. Create **object type groups** : Enter the group's name(s), then edit the group to add related object types.
6. **Configure the object types**: Add **fields** , **relationships**, **formulas** , **roles** , and **inferred permissions** , and configure the **workflow states** , triggers, transitions, conditions, and actions.
7. **Add object types to roles** : Configure the workflow permissions for each state on each object type added to the role.
8. Create **forms** and **data visualizations** for the object types.
9. Configure the activities' **actions** , **roles** , and **views** .

The steps to complete the above process are discussed in detail the remainder of this guide.