

Configuring the Task Group Form for Playbooks Automation

Last Modified on 02/13/2025 1:57 pm EST

Overview

Additional configuration of the **Task Group** form is required to ensure it is ready to be used with playbooks.

Note: Configuring the **Task Group** form is currently a manual step. However, this will be included as part of the configuration that will be automatically applied to your Org in an upcoming release.

User Account Requirements

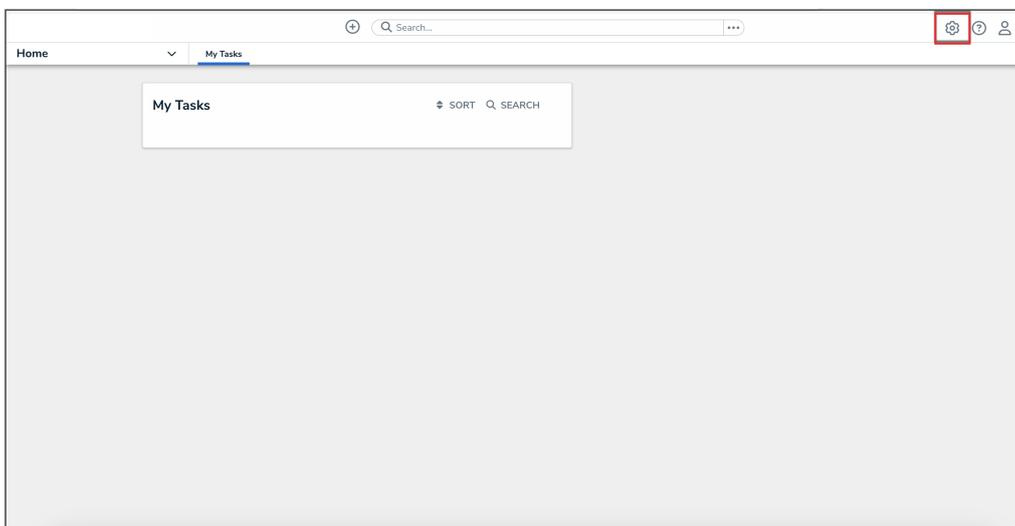
The user account you use to log into Resolver must be an Administrator to edit forms.

Related Information/Setup

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

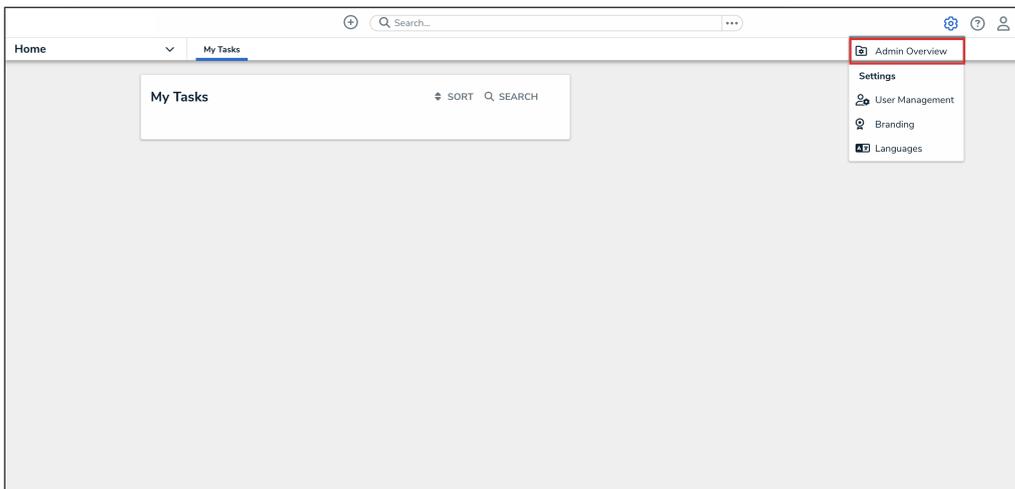
Navigation

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



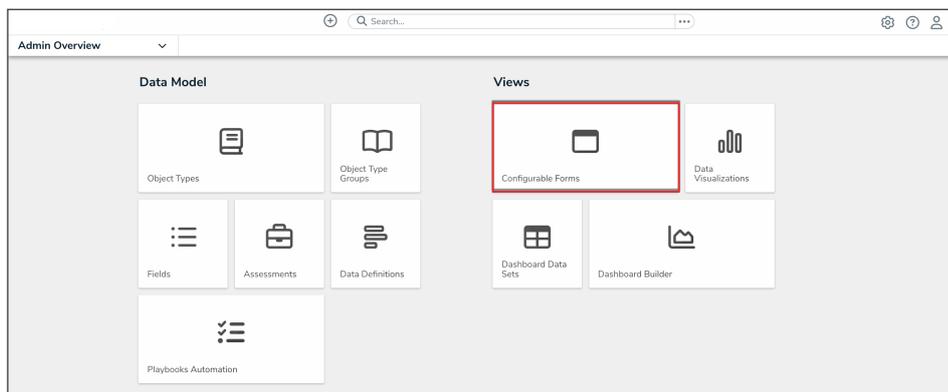
Administration Icon

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



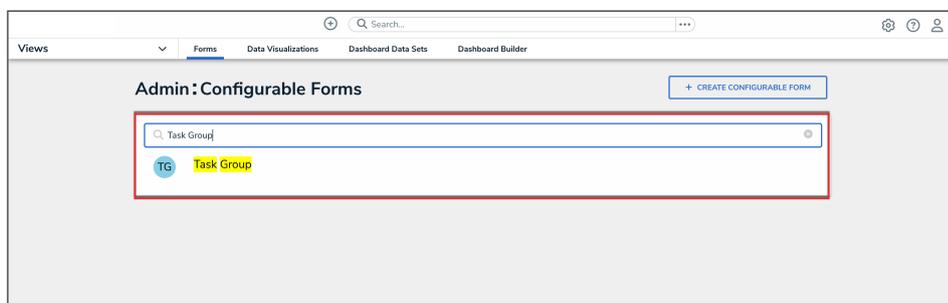
Administrator Settings Menu

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



Configurable Forms Tile

- From the **Configurable Forms** screen, search for the **Task Group** form.

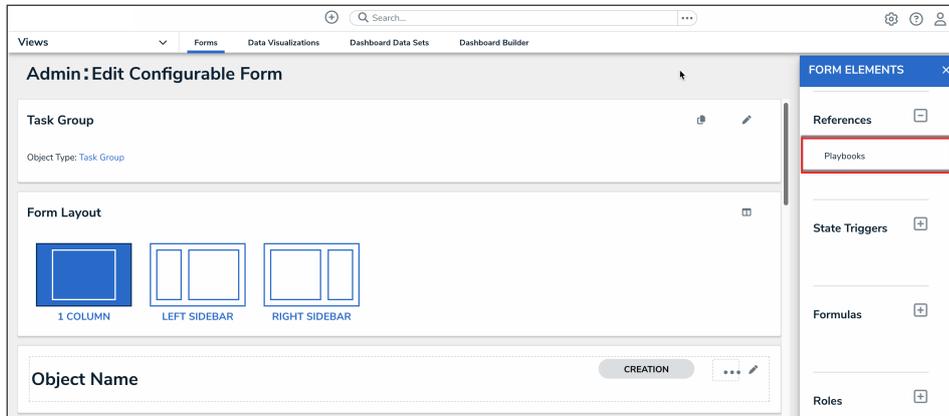


Search Field

- Click the **Task Group** form to open it.

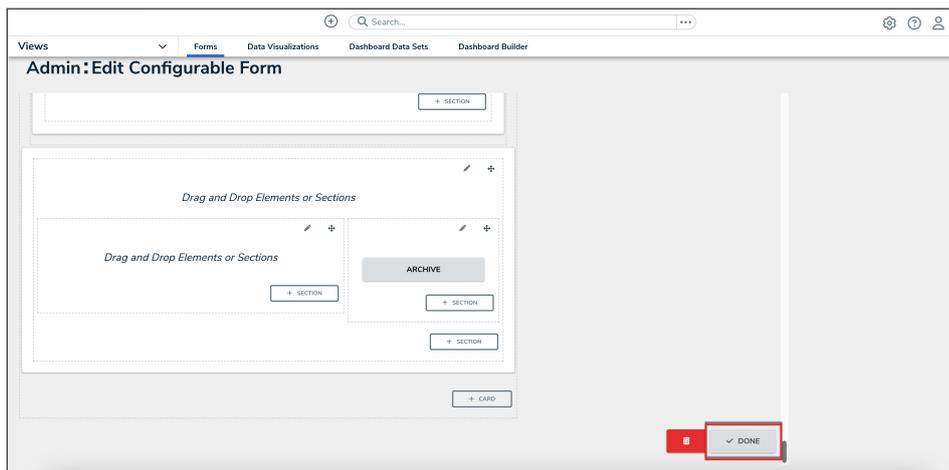
Configuring the Task Group Form

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



Playbooks Reference

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



Done Button