

Action Buttons

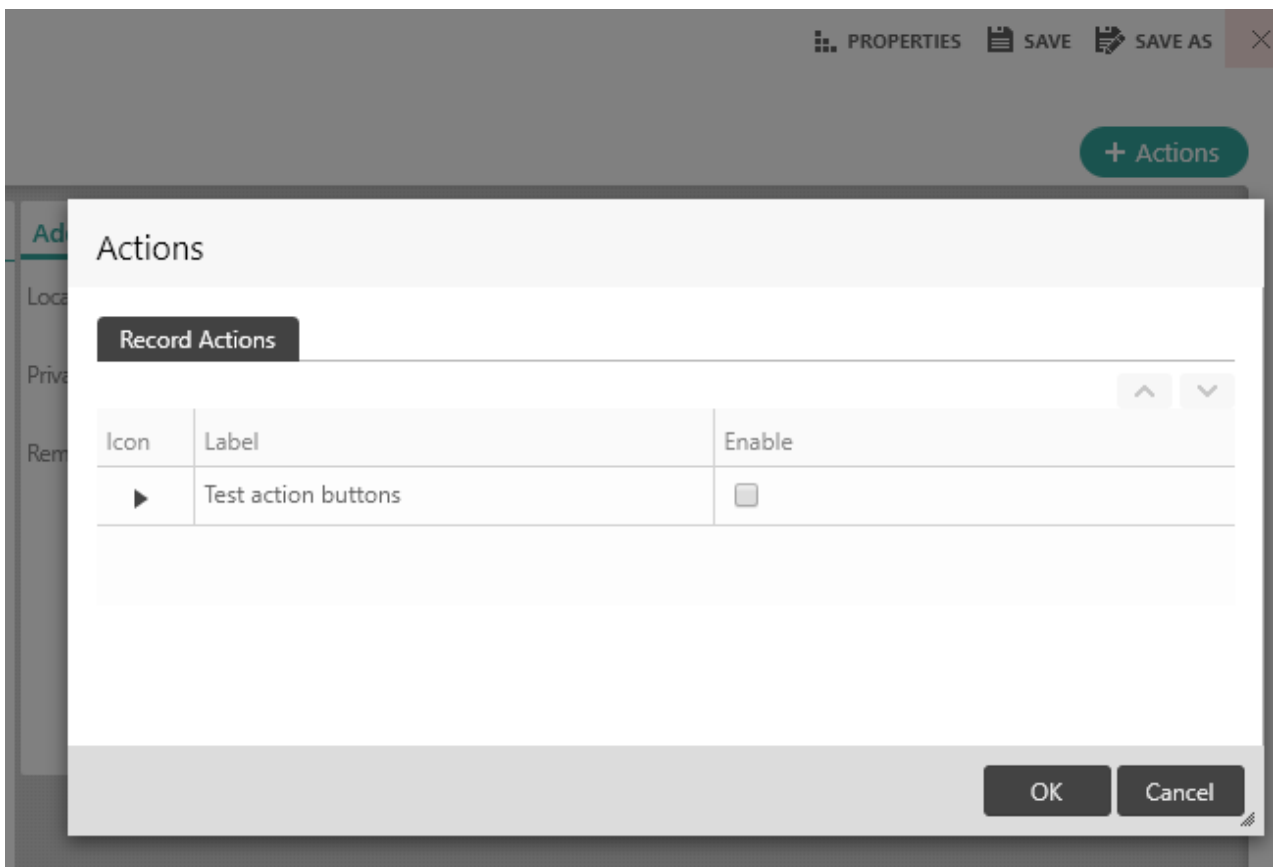
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An Action button allows you to start a workflow or generate a document from a form or screen.

You can select more than one action on the same form.

To enable the workflow or document generation on the form:

1. Open the [Form Builder](#)
2. Select the **+ Actions** button. The Actions dialogue appears as shown in the screenshot.
3. Select the checkbox for the required action in the **Enable** column (workflow or document generation).
4. Select **OK**.
5. Select **SAVE** to save the form.



To start the workflow or generate the document:

1. Navigate to the report which is created using the same object.

2. Select any record and go to New / Edit / View mode of the record on the report.
3. Select the Action button on the form to run the action on that form alone.

The workflow or document generation needs to exist to select the workflow or document generation from the form builder.

Please see [Creating and Editing Workflows](#) for workflows and [Document Generation Overview](#) for documents.
