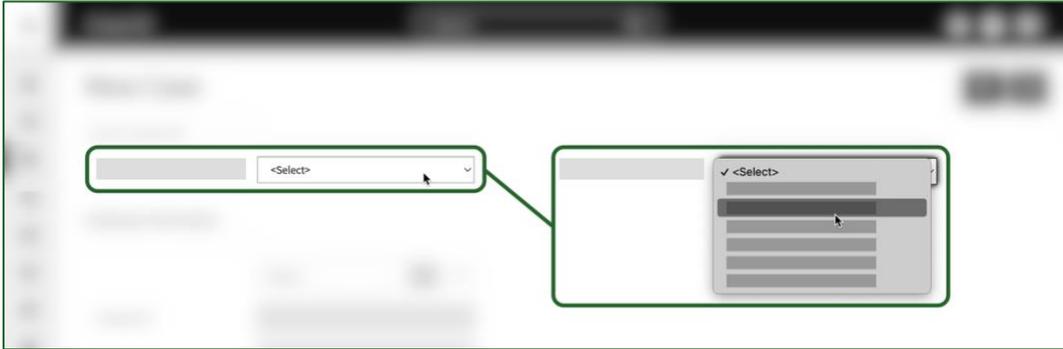


## 6.2 Configure Dropdowns

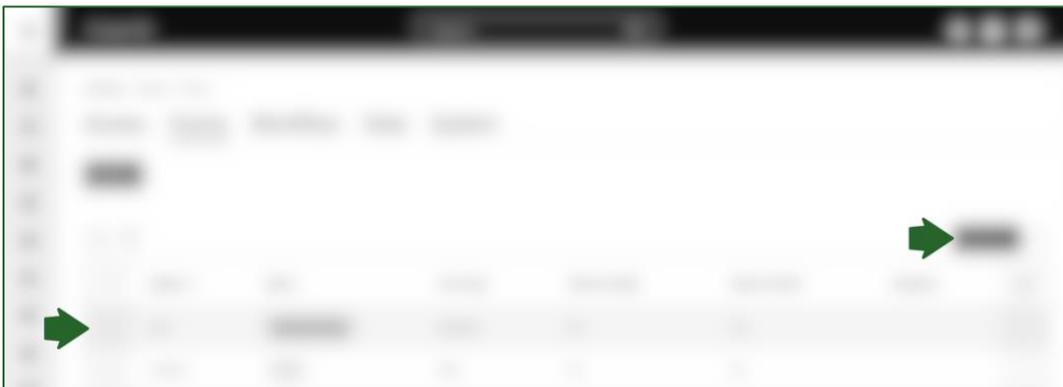
On [product] forms, you can click dropdown fields to select one or more options. You can add dropdowns to forms and configure the options available in them based on your organization's needs.



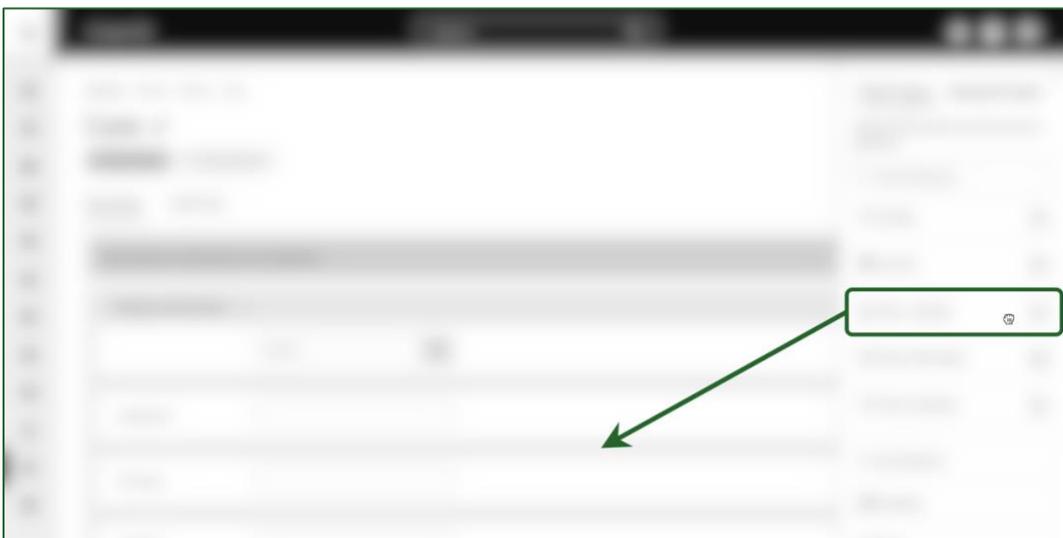
### 6.2.1 Create a New Dropdown

You can add a dropdown or multi-select dropdown field to one of your forms using the following steps:

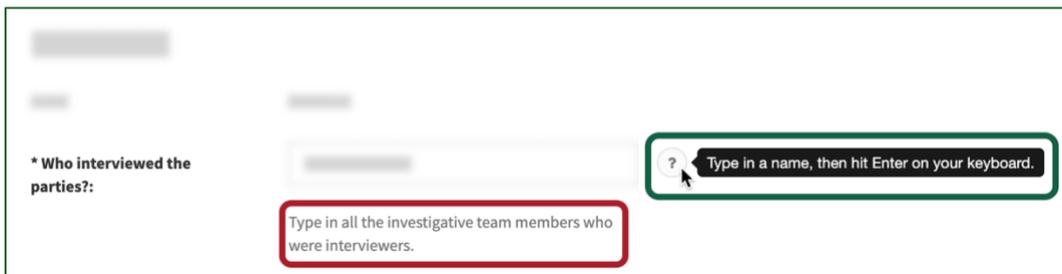
1. In Settings, click the Forms tab.
2. To add a dropdown to an existing form, click the form on the Forms page. Then, click the **Edit** button.
  - a. If you want to create a new form, click the **Add Form** button on the Forms page and fill in the New Form pop-up.



3. Click the **Insert Fields** button to open the Field Type sidebar.
4. Find the "Dropdown" or "Multi-Select Dropdown" option in the Field Type sidebar. To add a field to your form layout, click and hold it in the Field Type sidebar, drag it to the form, and let go of your cursor.



5. The dropdown will be added to the page, and you can fill in the following fields in the Dropdown pop-up:
  - a. Name: the dropdown's name in the system, which will be shown on grids and reports.
  - b. Caption: the text beside the dropdown on the form. You can enter a concise "Name" for the dropdown to show in grids and reports, such as "Interviewers". Then, you can phrase the "Caption" text as a question to help users filling in the form, such as "Who interviewed the parties?".
  - c. Required: choose if users must select an option for the dropdown before they can submit the form.
  - d. Show on Intake: choose whether to show the dropdown when adding a new record.
  - e. Sub Text: enter any help text to display under the dropdown field. For example, you may want to provide clear and prominent instructions to fill in the form. In the screenshot below, the field's sub text is highlighted in **red**.
  - f. Help Text: more discrete guidance text, which will only be displayed when the user hovers their cursor over a question mark icon beside the dropdown. The help text is highlighted in **green** in the screenshot below.



6. When you have finished entering the dropdown's properties, click **Save** in the pop-up.
  - a. You can now add options for the dropdown menu. See steps in the next section, [Add Options for a Dropdown](#).
7. To make the new dropdown field available on the form, click the **Publish** button.

