

Flow Designer

First navigate to the Flows Home Page inside one of your applications. See the [Flows Home Page](#) for help navigating here.

We recommend that tenant admin users not create or edit flows, nor have roles assigned to them. These users should restrict themselves to administrative tasks.

Once you are in a flows home page, start by clicking New



to add your first application. Then click the name of the application or the Edit



icon and click New



to create your first flow.

A unique and arbitrary flow name will be generated automatically--Flow 31 for example. You'll change this name when you begin working on your flow to something meaningful like Employee On Boarding shown below.

The Flow Designer has several components. Each is described below.

On This Page:

- [Palette](#)
- [Properties Area](#)
- [Flow Work Area](#)
- [Toolbar](#)

Palette

The palette contains all of the forms in your application's form tab, a new form, an HTTP and a Summary step. Click on the form you want and drag it into your flow. See [adding steps to your flow](#) for more information.

Properties Area

The Properties area shows the properties that are available for the entire flow or those available for flow steps. This is where you define workflow navigation, customize button labels, configure task information, pending messages and task notification emails seen by the flow users etc.

Some properties, such as Task Information and Pending Message offer the designer the opportunity to define them on the flow level or customize them for individual steps.

- Click on the Toolbar at the top of the flow work area to access flow properties for viewing/editing.
- When you click on a flow step, a **Properties Navigator** panel displays in the lower-left portion of the Flow Designer. This panel shows information about important properties setup for this flow step. Not all of the configured properties are shown in this view. Clicking inside a section or clicking on the



Edit Step Properties icon in a section of the **Properties Navigator** immediately displays the property tab for editing.

Flow Step Name

Flow Step Name

Click inside a section of the Properties Navigator or click the icon in that section to go directly to the properties tab.

Icons for individual form flow steps.

Icons for linked steps, HTTP, Summary and legacy Anonymous Email or HTTP-Wait Notify

