Making Forms Relevant with Conditional Questions

Welcome, we will start shortly!

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Meet Your Trainer

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Learning Objective

The goal for our session is show you ways to make your forms more relevant and user friendly via our Form Logic feature by creating conditional rules that impact the behavior of other questions within the form.

Agenda

- Overview
- How to Configure
- Reminders & Tips

Overview

Overview

Ability to set conditions within a form to impact the behavior of other fields or sections.

Benefits

Prioritize Relevance

Streamline Data Entry

Keep Forms Consolidated

How to Configure

How to Configure Form Logic

Step 1: Enable Form Logic.

Step 2: Create related fields.

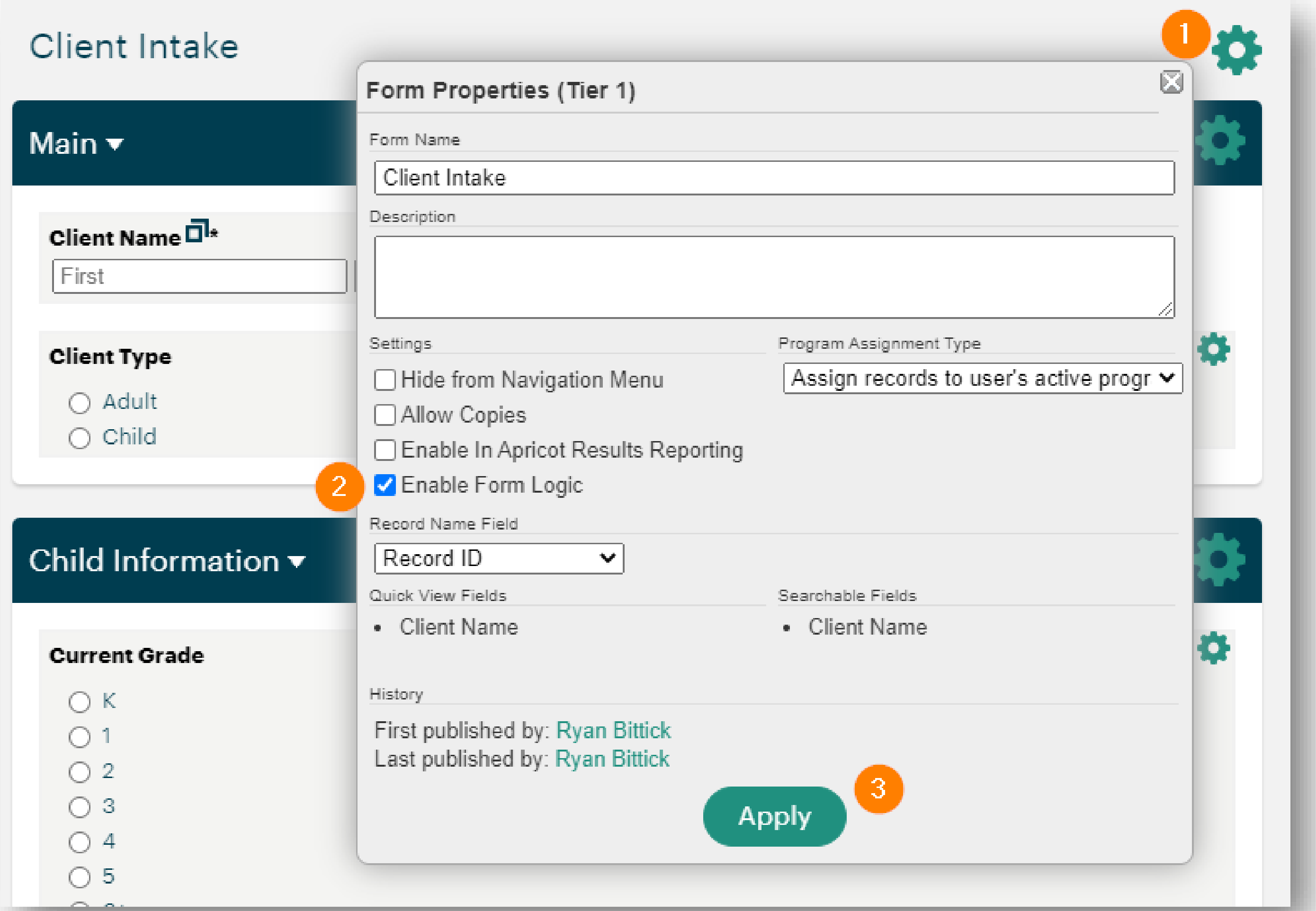
Step 3: Add Conditions.

Step 4: Add Actions.

Step 5: Publish and test!

How to Configure Form Logic

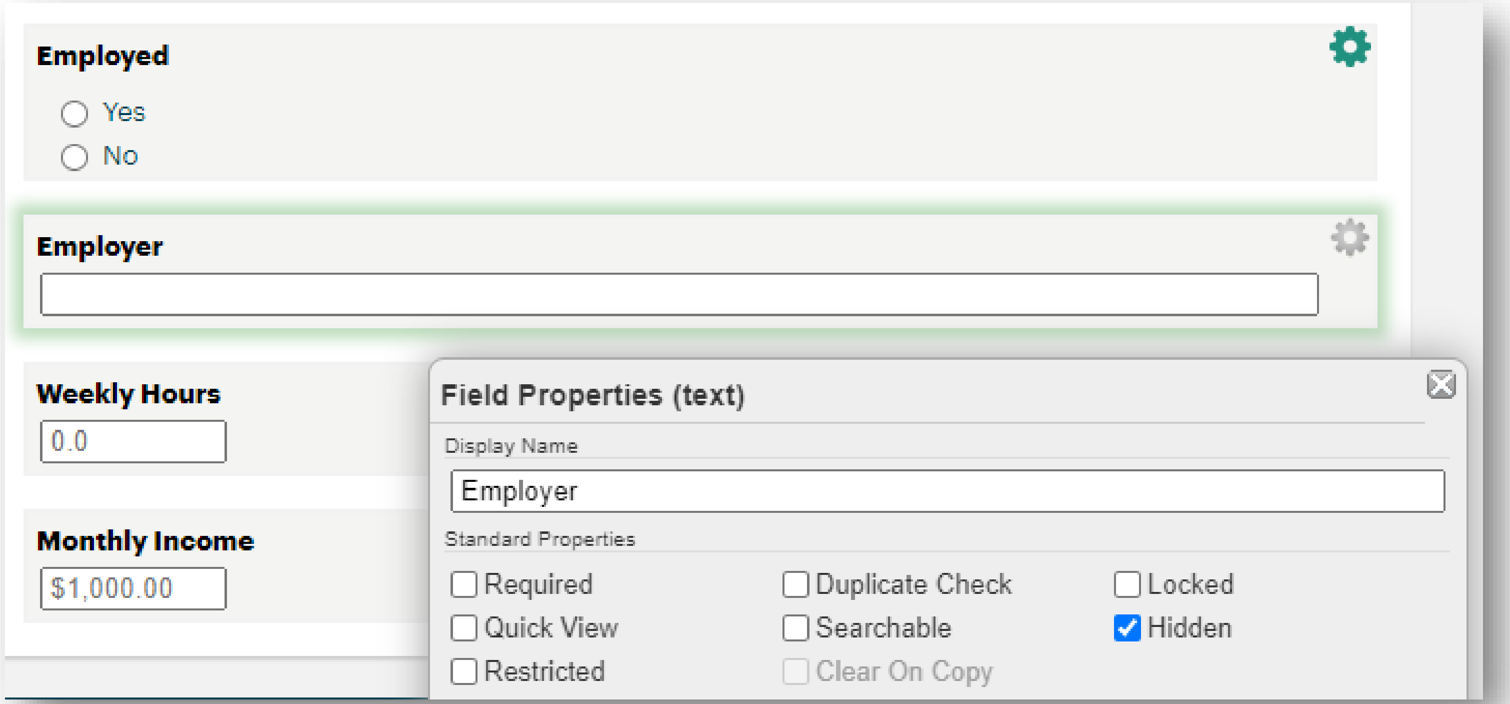
Step 1: Enable Form Logic.



How to Configure Form Logic

Step 2: Create related fields.

- Field(s) to trigger rule.
- Section(s) or Field(s) impacted by the rule.
- Choose pre-action settings.



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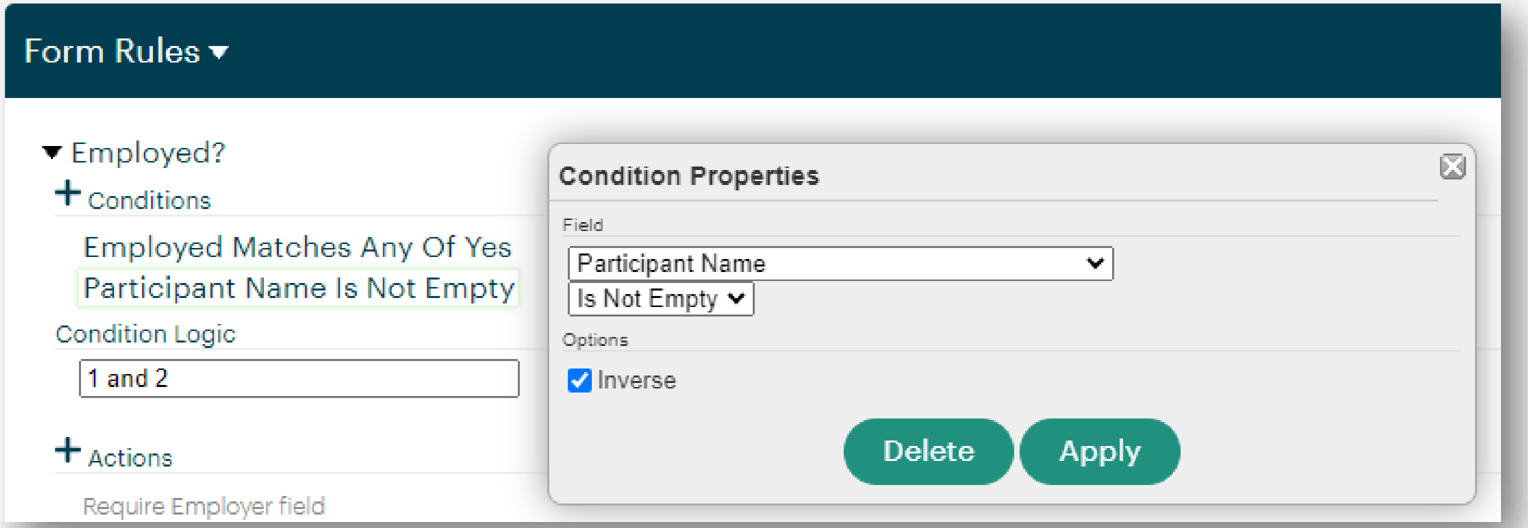
How to Configure Form Logic

Step 3: Add Conditions.

- One or more field triggers.
- Select Inverse for opposite.
- Can use AND or OR logic.

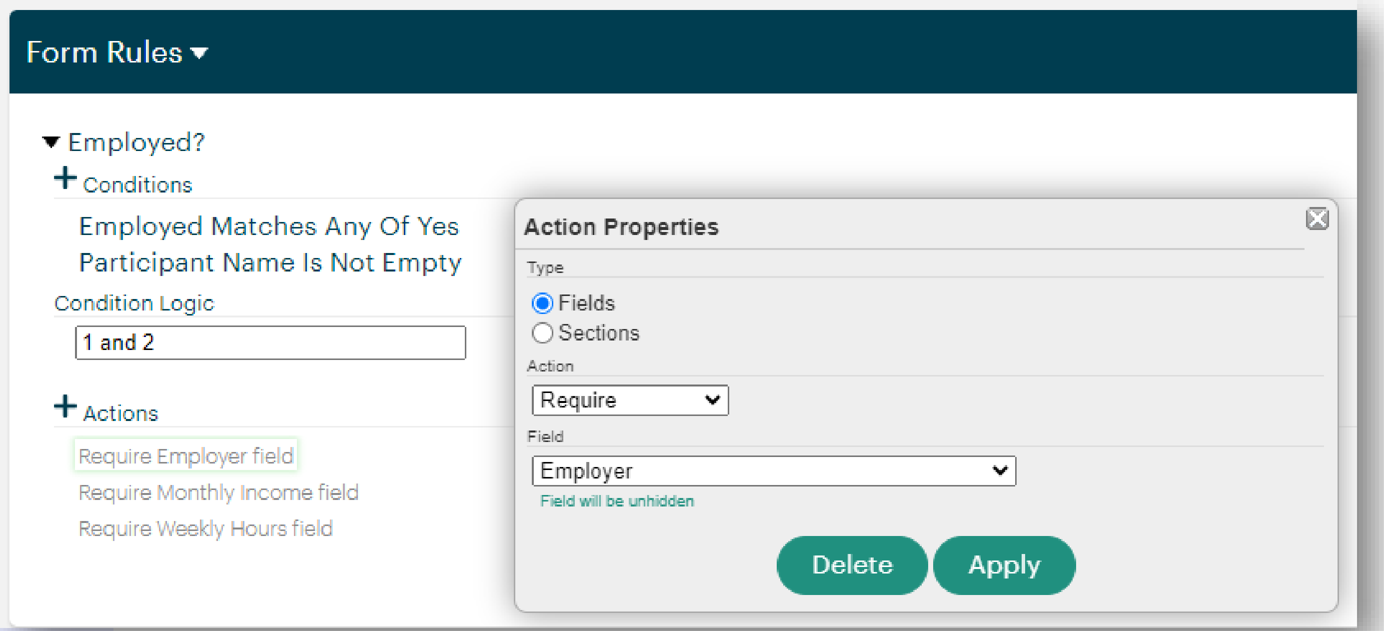


- Equals / Is Empty
- Before / After / Between
- This Week / Month / Year
- Begins / Ends With / Contains
- Greater / Less Than / Between
- Matches (Options)

How to Configure Form Logic

Step 4: Add Actions.

- Field or Section level.
- Can include multiple.



Field

- Unhide
- Require
- Lock
- Highlight
- Use Lookup List
- Set Value

Section

- Unhide
- Expand
- Scroll To
- Require All Fields Within
- Lock All Fields Within

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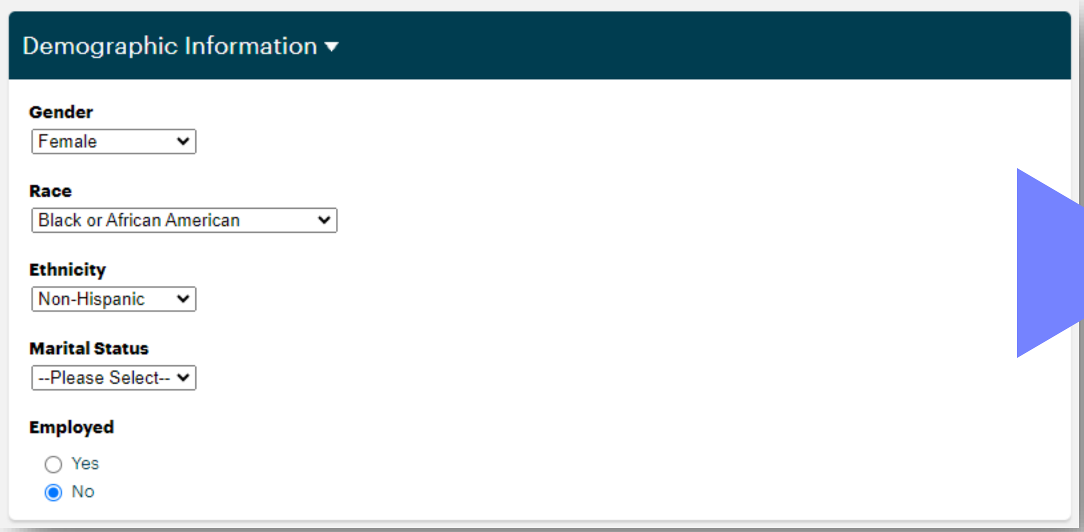
How to Configure Form Logic

Step 5: Publish and test.

- Always check your work!


Demographic Information ▾

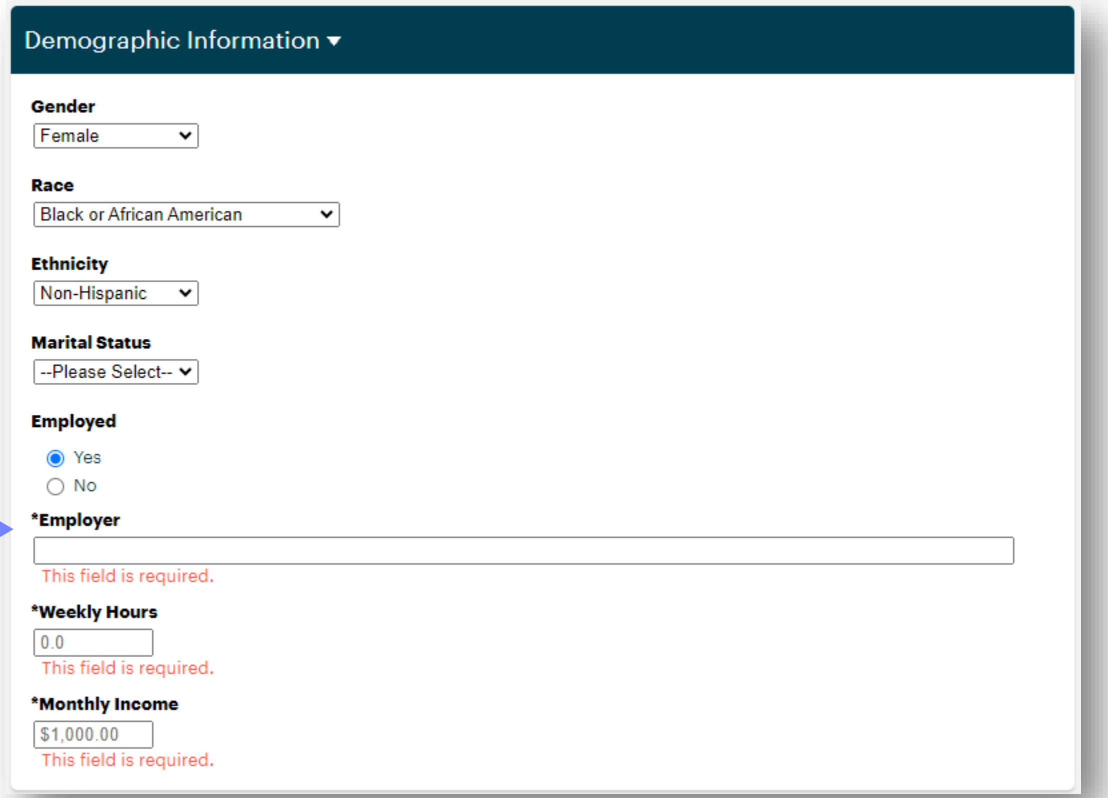
Gender
Female

Race
Black or African American

Ethnicity
Non-Hispanic

Marital Status
--Please Select--

Employed
Yes
No


Demographic Information ▾

Gender
Female

Race
Black or African American

Ethnicity
Non-Hispanic

Marital Status
--Please Select--

Employed
Yes
No

*Employer
This field is required.

*Weekly Hours
0.0
This field is required.

*Monthly Income
$1,000.00
This field is required.

Reminders & Tips

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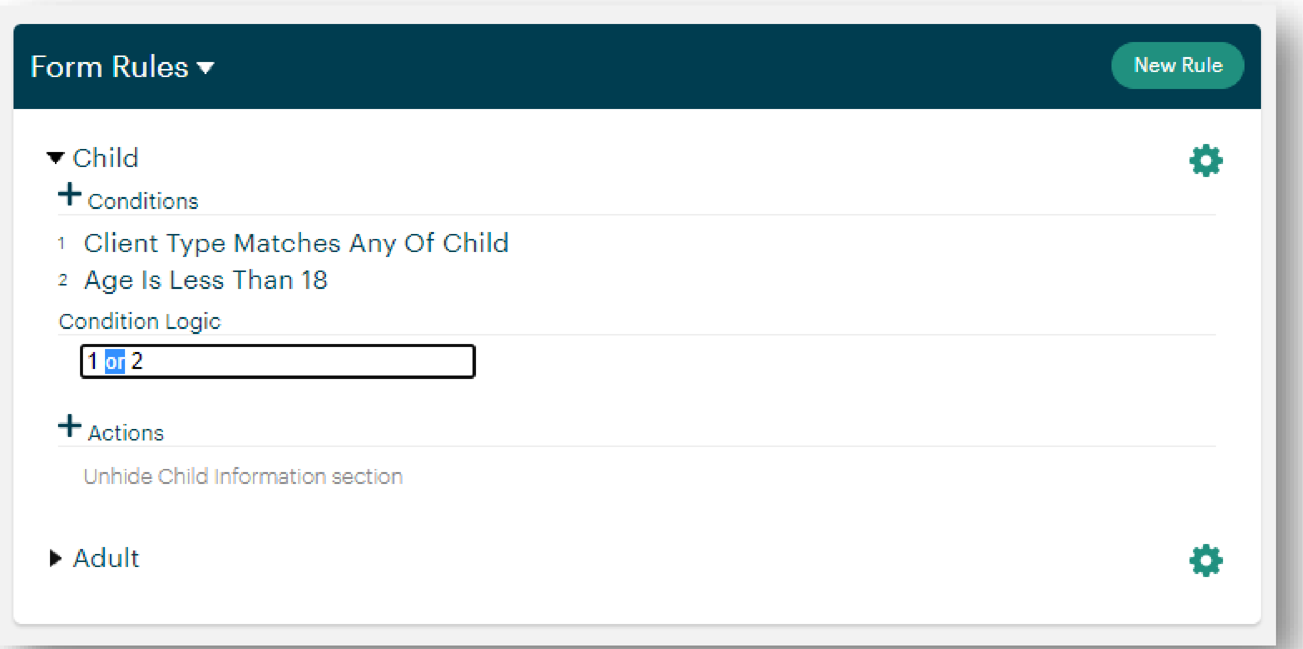
Reminders & Tips

1. Too many Form Logic Rules can **slow down** a form.

2. **Consolidate** Form Logic rules when possible if resulting Action is the same.

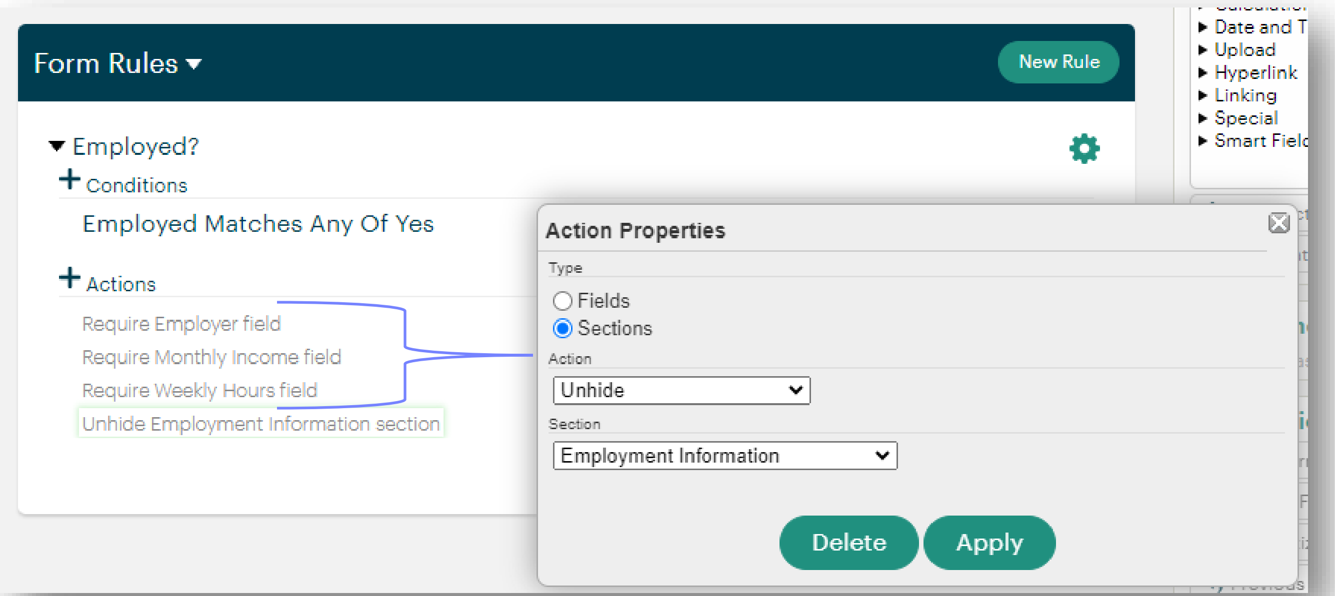


Reminders & Tips

1. Too many Form Logic Rules can **slow down** a form.

2. **Consolidate** Form Logic rules when possible if resulting Action is the same.

3. Where possible, **group fields into a Section** to reduce Action(s) needed.



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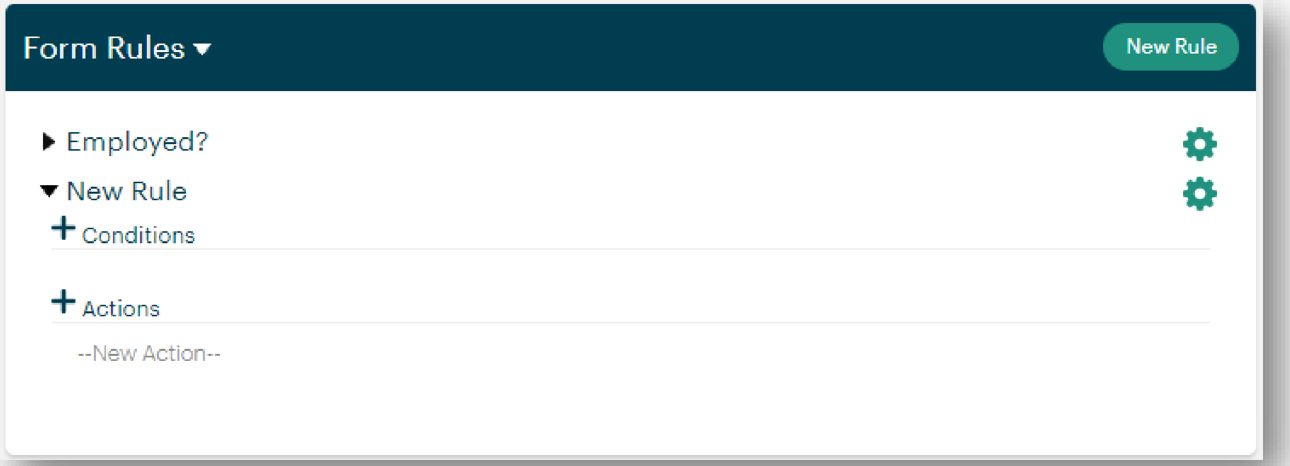
Reminders & Tips

1. Too many Form Logic Rules can **slow down** a form.

2. **Consolidate** Form Logic rules when possible if resulting Action is the same.

3. Where possible, **group fields into a Section** to reduce Action(s) needed.

4. Make sure you don't end up with any **empty Rules** (Conditions or Actions) to avoid errors.



Reminders & Tips

1. Too many For
2. **Consolidate**
3. Where possib
4. Make sure yo
5. If you need to
6. Be mindful tha

Field Category	**Field Type**	**Actions** (All Field Types)
Text, Hyperlink	Append Only Dynamic Text Website	Highlight Use Lookup List Set Value
Numeric	Dynamic Number	
Date and Time	Dropdown Date Scheduler	
Linking	Auto Populate Dynamic Checkboxes Dynamic Dropdown Link User Creation	
Special	**Email Triggers (coming 8/28/20)** Record Lock	
Funders (AFF only)	Grant (AFF) Grant Invitation (AFF) Review Assignment (AFF)	
System Fields	Record ID	

Additional Resources

Additional Training Opportunities

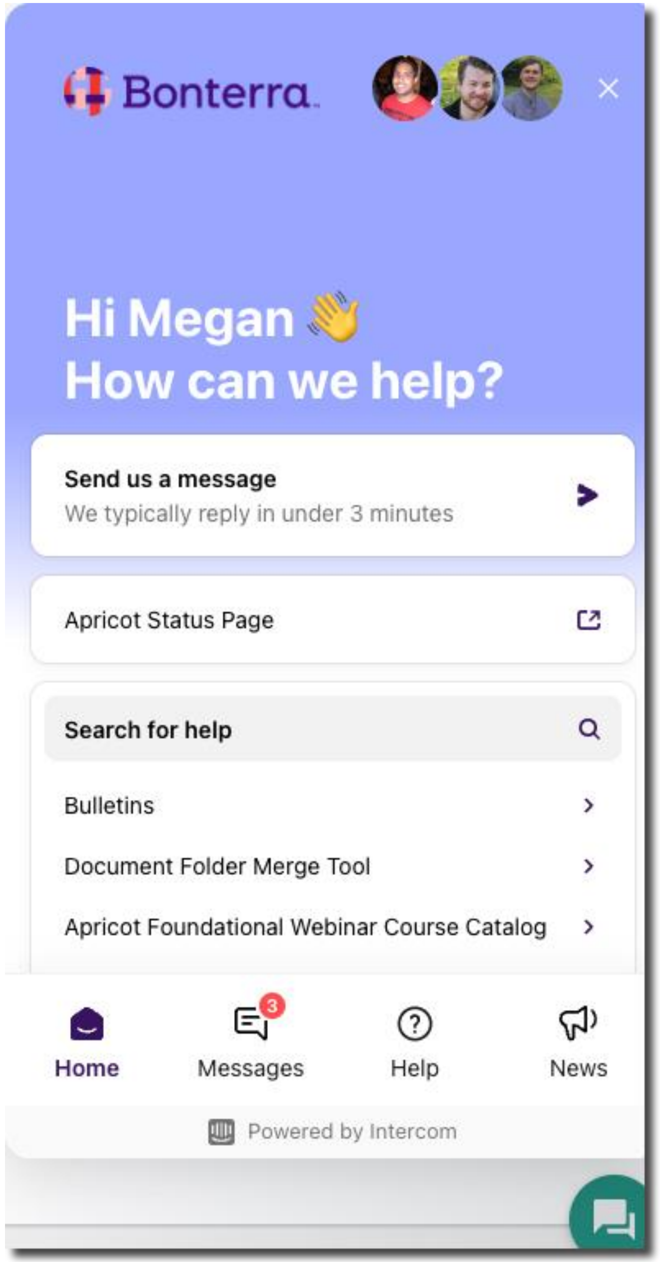
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

Build confidence & knowledge in our software!

Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: apricot@bonterratech.com



Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!

Thank you for attending!

We hope to see you
in future trainings.

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