

# Making Forms Relevant with Conditional Questions

Welcome, we will start shortly!

# Meet Your Trainer

Annie Novacek

Sr. Training Specialist

[ClientTrainingRequests@BonterraTech.com](mailto:ClientTrainingRequests@BonterraTech.com)



# 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

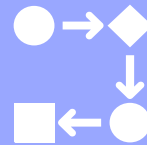
# Overview

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.

The screenshot displays the 'Client Intake' form configuration interface. The main form is partially visible on the left, showing sections for 'Main' and 'Child Information'. The 'Main' section includes a 'Client Name' field with the value 'First' and a 'Client Type' section with radio buttons for 'Adult' and 'Child'. The 'Child Information' section includes a 'Current Grade' section with radio buttons for 'K', '1', '2', '3', '4', and '5'. A 'Form Properties (Tier 1)' dialog box is open in the foreground, showing the following configuration options:

- Form Name:** Client Intake
- Description:** (Empty text area)
- Settings:**
  - Hide from Navigation Menu
  - Allow Copies
  - Enable In Apricot Results Reporting
  - Enable Form Logic
- Program Assignment Type:** Assign records to user's active progr (dropdown menu)
- Record Name Field:** Record ID (dropdown menu)
- Quick View Fields:** Client Name
- Searchable Fields:** Client Name
- History:** First published by: Ryan Bittick, Last published by: Ryan Bittick

An 'Apply' button is located at the bottom right of the dialog box. Three orange callout numbers are present: '1' points to the gear icon in the top right corner of the main form; '2' points to the 'Enable Form Logic' checkbox; and '3' points to the 'Apply' button.

# 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.

The screenshot displays a form configuration interface with several sections: 'Employed' (radio buttons for Yes/No), 'Employer' (text input field), 'Weekly Hours' (text input field with '0.0'), and 'Monthly Income' (text input field with '\$1,000.00'). A 'Field Properties (text)' dialog box is open over the 'Employer' field, showing the following settings:

- Display Name: Employer
- Standard Properties:
  - Required
  - Duplicate Check
  - Locked
  - Quick View
  - Searchable
  - Hidden
  - Restricted
  - Clear On Copy

# 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)

The screenshot displays the 'Form Rules' configuration interface. The main panel shows a rule for 'Employed?' with a plus sign to add conditions. The current condition is 'Employed Matches Any Of Yes Participant Name Is Not Empty'. The 'Condition Logic' is set to '1 and 2'. Below this, there is a plus sign to add actions and a note 'Require Employer field'.

The 'Condition Properties' dialog box is open, showing the following configuration:

- Field: Participant Name
- Is Not Empty
- Options:  Inverse

Buttons for 'Delete' and 'Apply' are visible at the bottom of the dialog.

# 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

The screenshot displays the 'Form Rules' configuration interface. A rule titled 'Employed?' is expanded to show its configuration. Under the 'Conditions' section, two conditions are listed: 'Employed Matches Any Of Yes' and 'Participant Name Is Not Empty'. The 'Condition Logic' is set to '1 and 2'. Under the 'Actions' section, three actions are listed: 'Require Employer field', 'Require Monthly Income field', and 'Require Weekly Hours field'. An 'Action Properties' dialog box is open, showing the configuration for the 'Require' action. The 'Type' is set to 'Fields', the 'Action' is 'Require', and the 'Field' is 'Employer'. A note below the field indicates 'Field will be unhidden'. The dialog box has 'Delete' and 'Apply' buttons.

# How to Configure Form Logic

## Step 5: Publish and test.

- Always check your work!

Demographic Information ▾

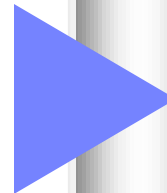
**Gender**  
Female ▾

**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

# 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.

The screenshot displays a 'Form Rules' configuration window. At the top, there is a dark teal header with the text 'Form Rules' and a 'New Rule' button. Below the header, the interface is organized into sections. The first section is 'Child', which is expanded to show two conditions: '1 Client Type Matches Any Of Child' and '2 Age Is Less Than 18'. Underneath these conditions is a 'Condition Logic' section with a dropdown menu set to '1 of 2'. Below the conditions is an 'Actions' section with a single action: 'Unhide Child Information section'. At the bottom of the window, there is a collapsed section for 'Adult'. Green gear icons are visible next to the 'Child' and 'Adult' section headers.

# Reminders & Tips

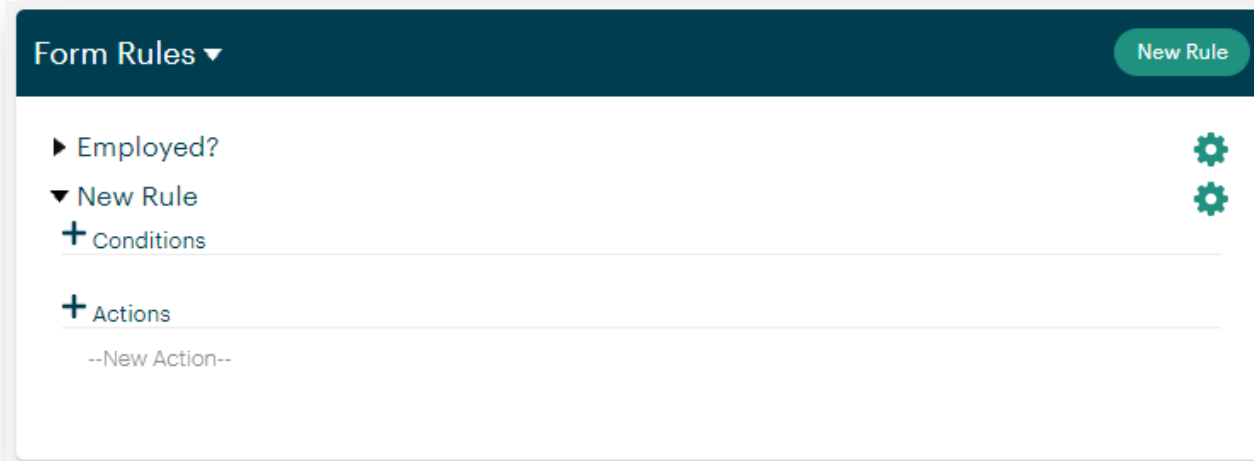
1. Too many Form Logic Rules can **slow down** a form.
2. **Consolidate** Form Logic rules when possible if resulting Action is the same.
3. Where possible, **group fields into a Section** to reduce Action(s) needed.

The screenshot displays the 'Form Rules' configuration interface. A rule titled 'Employed?' is shown with a condition 'Employed Matches Any Of Yes'. Under the 'Actions' section, four actions are listed: 'Require Employer field', 'Require Monthly Income field', 'Require Weekly Hours field', and 'Unhide Employment Information section'. The 'Unhide Employment Information section' action is highlighted with a green box. A blue bracket groups the first three actions, and a blue line points from this group to the 'Action Properties' dialog. The dialog shows 'Type' set to 'Sections' (selected with a radio button) and 'Action' set to 'Unhide'. The 'Section' dropdown is set to 'Employment Information'. 'Delete' and 'Apply' buttons are visible at the bottom of the dialog.



# 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	<b>Email Triggers (coming 8/28/20)</b> 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)

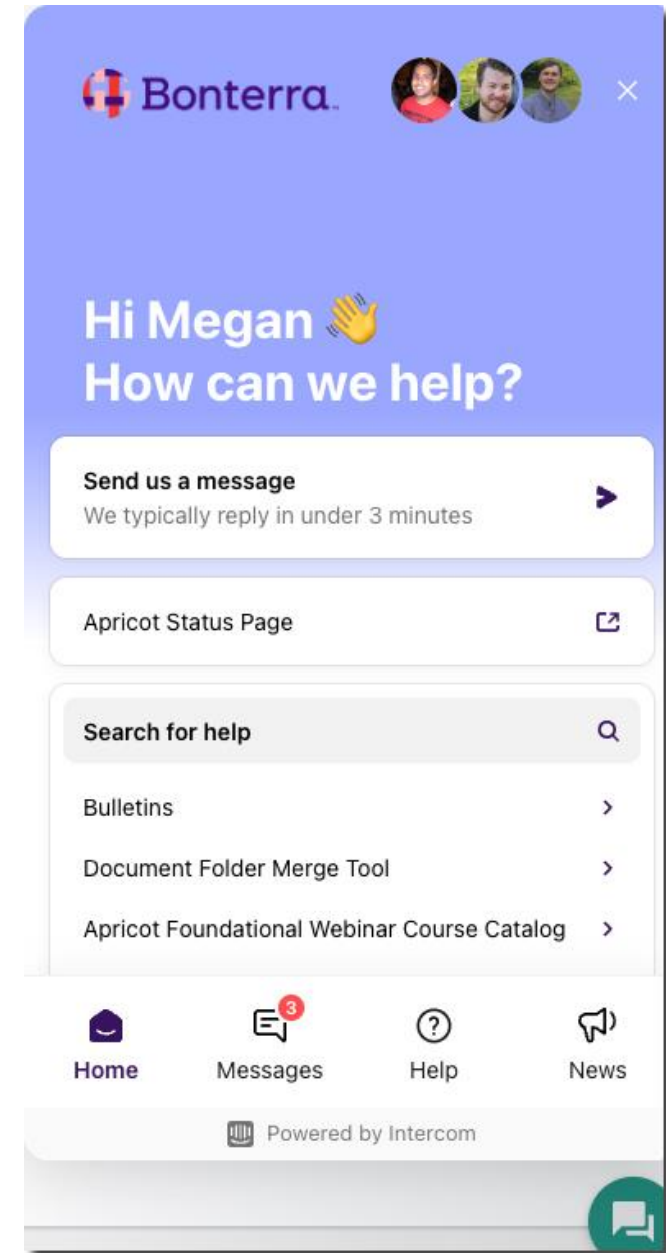


Build confidence & knowledge in  
our software!

# 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](mailto: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.