



Introduce yourself in the chat! Which institution are you representing?

Conditional Logic in Forms

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Agenda

1. Intro to conditional logic
2. Create conditional logic
3. Logic Options
4. Notifications and Approvals
5. Any vs. All
6. Quick Tips
7. Q&A

What is conditional logic?

Conditional Logic

Will your event have any of the following

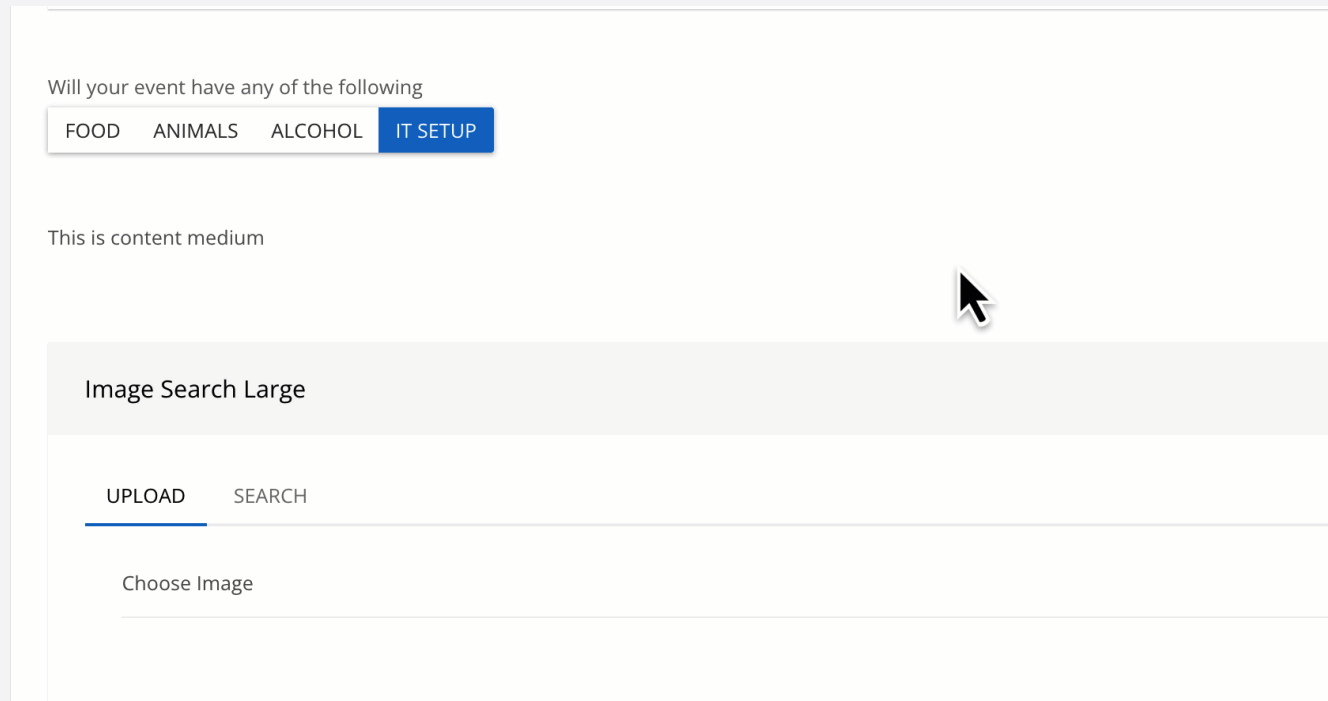
FOOD ANIMALS ALCOHOL **IT SETUP**

This is content medium

Image Search Large

UPLOAD SEARCH

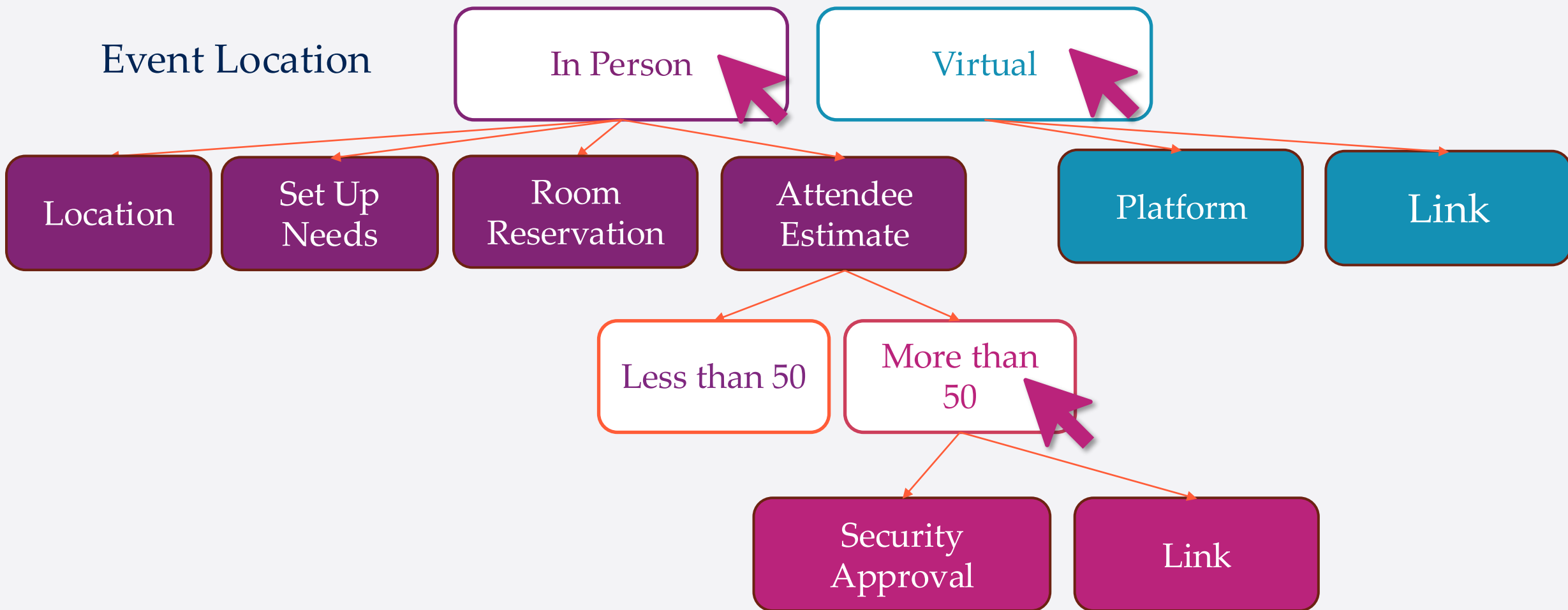
Choose Image



Dynamically show/hide
fields or field groups

Adjust notifications or
approvals based on
response

Event Registration



Leadership Program Application

Class

Undergrad

Graduate

Hide undergraduate
only opportunities

Selection

Peer Mentor

Leadership
Workshop

Experience

Upload Letter of
Recommendation

Rank your
preference

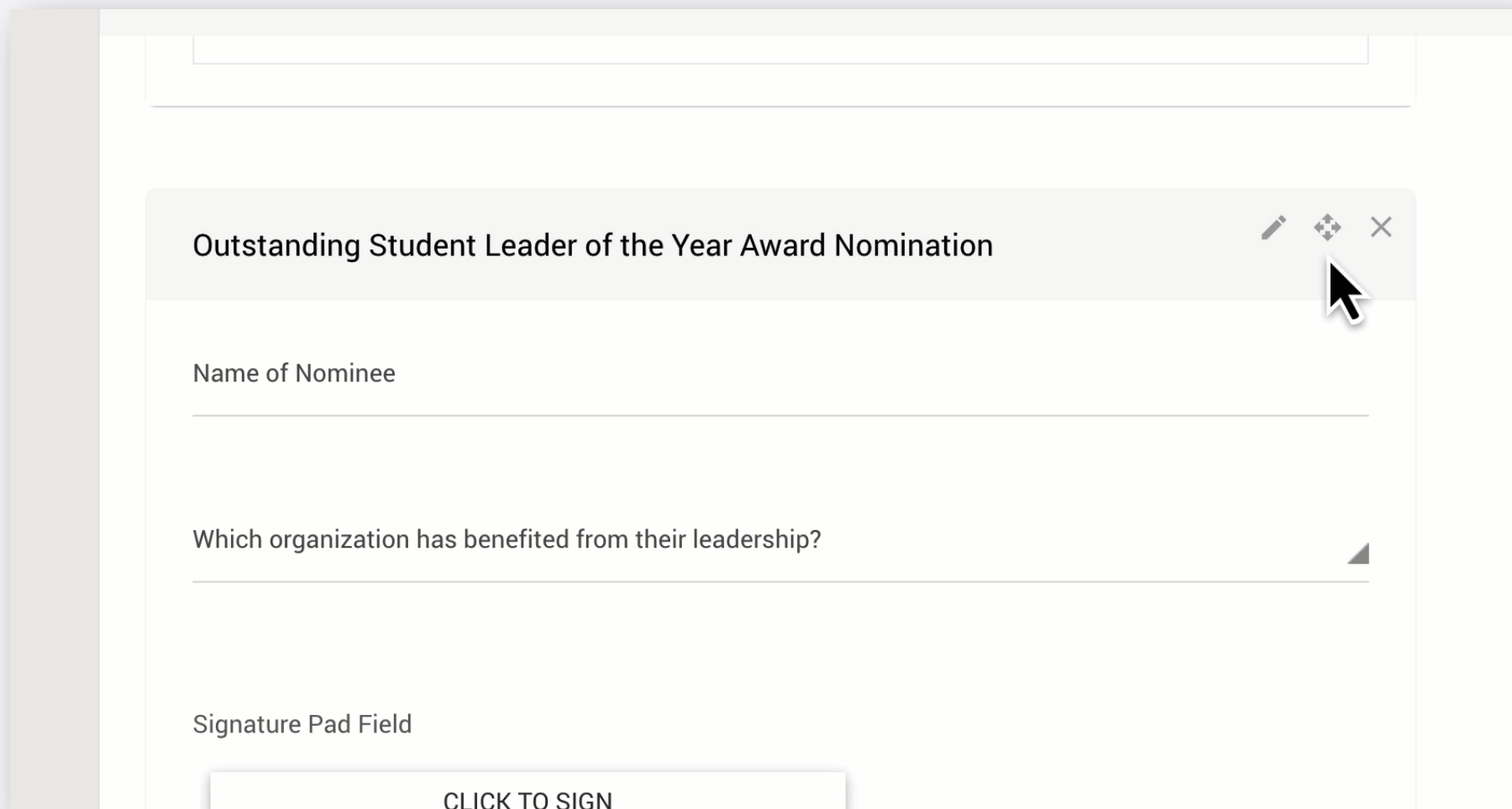
Select schedule
preferences

Benefits

- **Streamlined User Experience:** Students only see relevant fields based on their inputs.
- **Efficient Processes:** Reduces form complexity and saves time for administrators.
- **Automated Approvals/Notifications:** Logic triggers routing for approvals, speeding up workflows.
- **Data Accuracy:** Conditional fields ensure all necessary information is captured based on specific scenarios.

Create Conditional Logic

Select the field you want to show or hide and click the pencil icon.



The screenshot shows a form interface with a header bar containing the title "Outstanding Student Leader of the Year Award Nomination" and three icons: a pencil, a grid, and a close button. Below the header, there are three input fields: "Name of Nominee", "Which organization has benefited from their leadership?", and "Signature Pad Field". A "CLICK TO SIGN" button is located at the bottom of the form.

Outstanding Student Leader of the Year Award Nomination

Name of Nominee

Which organization has benefited from their leadership?

Signature Pad Field

CLICK TO SIGN

Select “Conditionals”

The screenshot shows a web browser window with the URL `trainingkelsey.presence.io/admin/form/update/2024-student-leader-excellence-award-nomination`. The main content area displays a form titled "2024 Student Leader Excellence Award Nomination" with a sub-header "Nominate for the 2025 award. Deadline for nomination is April 10th!". Below this, there is a section titled "Outstanding Student Leader of the Year Award Nomination" which contains three input fields: "Name of Nominee", "Which organization has benefited from their leadership?", and "Signature Pad Field". A "CLICK TO SIGN" button is visible at the bottom of the signature field. On the right side, a "Field Settings" sidebar is open, showing the configuration for the selected field. The "Field Name" is "Outstanding Student Leader of the Year Award Nomir", the "Field Description" is empty, and the "Field Size" is set to "MEDIUM". The "Field Group Settings" and "Conditionals" sections are also visible in the sidebar, with "Conditionals" being the active section.

Create your “sentence”

The screenshot shows a web browser with several tabs open: Search results, Form Building, Form Settings, Update Form, ChatGPT, New Tab, and Student Co-Cl. The address bar shows the URL: trainingkelsey.presence.io/admin/form/update/2024-student-leader-excellence-award-nomination. The main content area is titled '2024 Student Leader Excellence Award' and includes a sub-header 'Nominate for the 2025 award. Deadline for nomination is April'. Below this, there are several form fields: 'Outstanding Student Leader of the Year /', 'Name of Nominee', 'Which organization has benefited from their leader', and 'Signature Pad Field'. A 'Conditional Logic' panel is open on the right, with the instruction 'Create conditional rules to show and hide fields based on the responding user and other fields.' The panel contains a rule configuration: 'Show' followed by a dropdown menu set to 'if All', and another dropdown menu set to 'of the following match.' An 'ADD LOGIC' button is in the top right of the panel, and an 'ADD' button is in the bottom right of the rule configuration box. A mouse cursor is visible in the bottom right corner of the browser window.

Logic Options

Hide or Show? Any or All?

The image shows a configuration interface for a responder rule. It features a main container with a dropdown menu on the left, a text label, a second dropdown menu, and a button on the right. Below these elements is a horizontal line with a label and a dropdown menu.

Hide if All of the following match. ADD

Show

Hide

responder

All

Any

Operators

Target a Responder Type or a Specific Field

Show ▲ if All ▲ of the following match. ADD

Target

Responder ▲ Operators ▲ ×

Field

Responder

Field: Choose Your Field and Operator

Show if All of the following match. ADD

Target	Field	Operators
<u>Field</u>	<u>Student Leader Award</u>	<u>Operators</u>

- Is
- Is Not
- Is Empty
- Is Not Empty

×

Responder: Role or Officer Type

Show if All of the following match. ADD

Target

Responder Operators

- Role Of
- Officer Type Of

Select the Targeted Role

Show if All of the following match. ADD

Target	Operators	Roles
<u>Responder</u>	<u>Role Of</u>	<u>Roles</u>

- Campus Administrator
- Campus View
- Category Administrator
- Organization Administrator

Select the Targeted Officer Type

Show ▲ if All ▲ of the following match. ADD

Target	Operators	
<u>Responder</u>	<u>▲</u>	<u>Officer Type Of</u> <u>▲</u> <u>Officer Type</u> <u>▲</u> ×

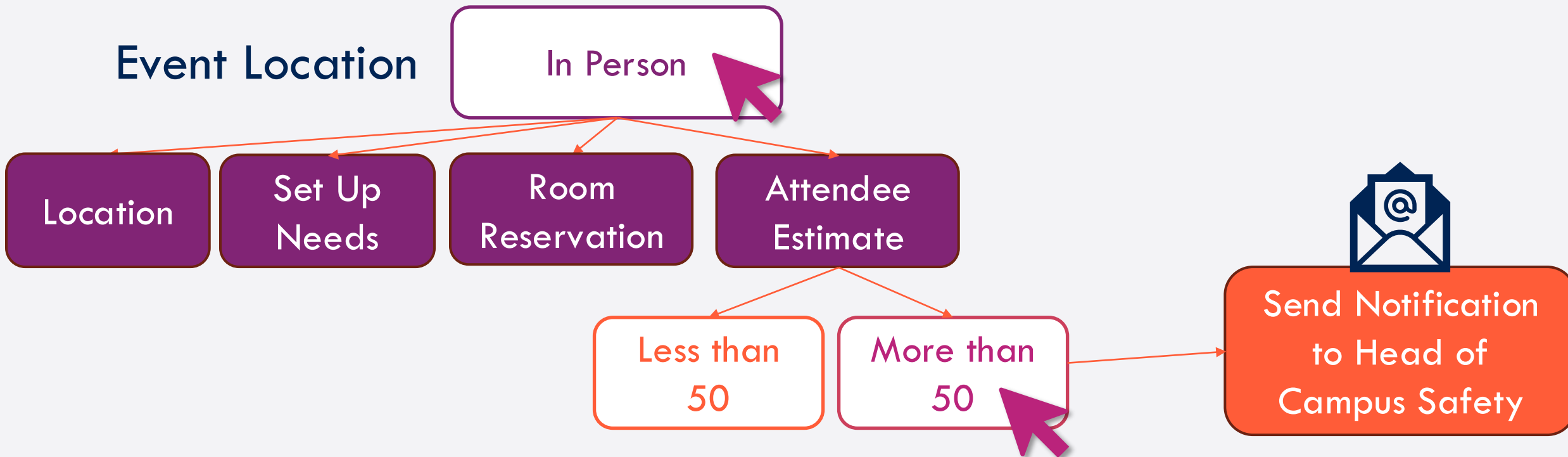
- Committee Chair
- Member
- President
- Secretary
- Treasurer
- Vice President

Platform Demo

- SGA Election Form
- Atlantis Event
 - FSL and Sports Club
 - Field → Basic Info → Host

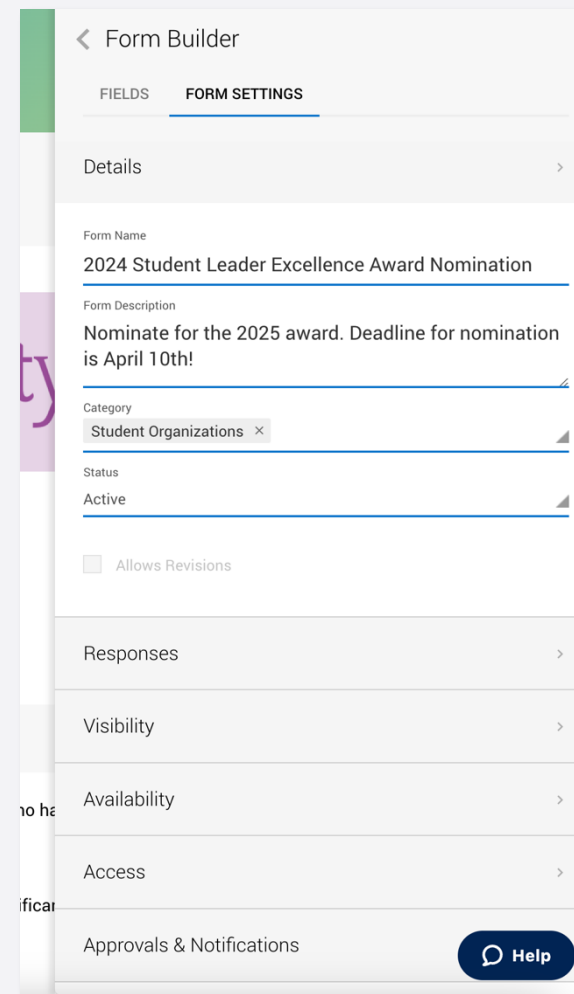
Notifications and Approval Conditional Logic

Event Registration



Notifications and Approval Logic

- Target specific field choices
- Send approval email
- Send notification email
- Declutter your inbox!



The screenshot displays the 'Form Builder' interface, specifically the 'FORM SETTINGS' tab. The form is titled '2024 Student Leader Excellence Award Nomination'. The description reads: 'Nominate for the 2025 award. Deadline for nomination is April 10th!'. The category is set to 'Student Organizations' and the status is 'Active'. There is an unchecked checkbox for 'Allows Revisions'. The interface includes sections for 'Details', 'Responses', 'Visibility', 'Availability', 'Access', and 'Approvals & Notifications'. A 'Help' button is located at the bottom right. Two pink arrows point to the top right and bottom right corners of the form builder window.

< Form Builder

FIELDS FORM SETTINGS

Details >

Form Name
2024 Student Leader Excellence Award Nomination

Form Description
Nominate for the 2025 award. Deadline for nomination is April 10th!

Category
Student Organizations x

Status
Active

Allows Revisions

Responses >

Visibility >

Availability >

Access >

Approvals & Notifications

Help

< Approvals

ORDERED ▾

ADD STAGE

What: User | Users: Caton, Sofia | Action: Approve | LOGIC | MESSAGE | CAN EDIT

Conditional Logic

All of the following match. [ADD]

Target	Field	Operators	Which one? Options
Field	Student Leader Awards - Which one?	Is	Outstanding Student Leader of the Year

[Add additional logic](#)

What: User | Users: Seale Kelsey (Me) | Action: Notify | LOGIC | MESSAGE

Platform Demo

- Atlantis Event Registration

Event Details

Some event details require additional information.

Will your event have any of the following

FOOD ANIMALS ALCOHOL IT SETUP

Is your event on or off campus?

ON CAMPUS OFF CAMPUS

Any vs. All

Hide

if All

c

All

Any

Target

Responder

Op

Conditional Logic

Create conditional rules to show and hide fields based on the responding user and other fields.

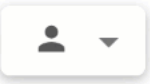
ADD LOGIC

Show **if All** of the following match.

ADD

Target	Field	Operators	Options
Field	Will your event have any o	Is	Food

Target	Field	Operators	Options
Field	Is your event on or off car	Is	On Campus



Will your event have any of the following

FOOD ANIMALS ALCOHOL IT SETUP



Is your event on or off campus?

ON CAMPUS OFF CAMPUS

This is content medium

Image Search Large

UPLOAD SEARCH

Choose Image



Show

if Any

of the following match.

ADD

Target

Field

Operators

Will your event have any of the following Options

Field

Will your event have any of

Is

Food

Target

Field

Operators

Will your event have any of the following Options

Field

Will your event have any of

Is

Animals

Target

Field

Operators

Will your event have any of the following Options

Field

Will your event have any of

Is

Alcohol

Will your event have any of the following

FOOD ANIMALS ALCOHOL IT SETUP



Is your event on or off campus?

ON CAMPUS OFF CAMPUS

This is content medium

Image Search Large

UPLOAD SEARCH

Choose Image



Conditional Logic Quick Tips

Expand Your Thinking (and Forms!)

- Not simply digitizing paper forms
- Use logic to combine multiple forms in one
- Remove unnecessary bulk!

Read Aloud

← Conditional Logic

ADD LOGIC

Create conditional rules to show and hide fields based on the responding user and other fields.

Show

if All

of the following match.

ADD

Target

Field

Operators

Mode of Transportation Options

Field

Travel Details - Mo

Is

Chartered Bus


Use Field Groups

Emerging Leader Award Nomination

Name of Nominee

Which organization benefited from their leadership?

Supporting Documents

Upload File 

Signature Pad Field

CLICK TO SIGN

x

Simplify

Will your event have any of the following

FOOD ANIMALS ALCOHOL IT SETUP

Q&A

Please put your questions into
the Zoom Q&A feature!

Thank You

See you next month!

modern
campus

modern[®]
campus



