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GOapply ADVANCED BUILDING TIPS & TRICKS

PRESENTED BY
ZOEY FIFE

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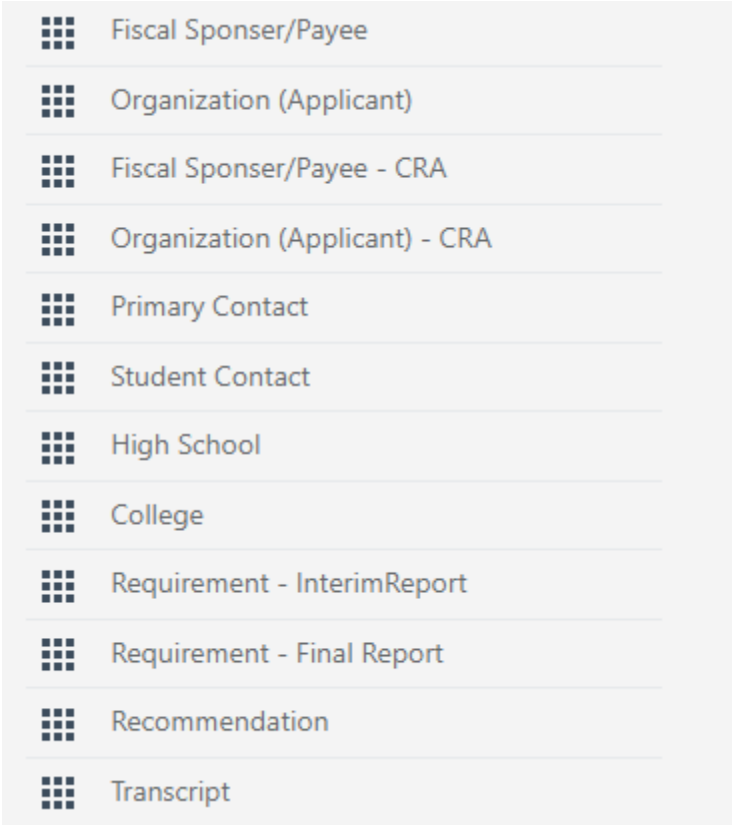
TOPICS

- Predefined Panels
- Dynamic Panels
- Conditional Logic
- Validation
- Form Settings
- Default Values
- Calculated Values
- Reverse mapping

PRE-DEFINED PANELS

- Pre-mapped ready to use panels that can be dragged and dropped into the form editor
- No additional mapping necessary
- Cannot edit, add, or remove fields
- Can be used conditionally

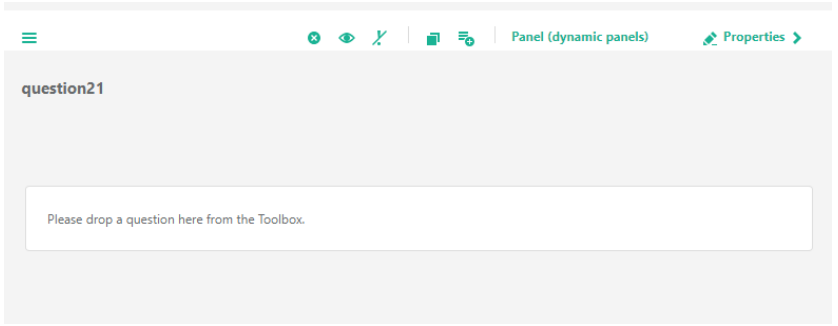


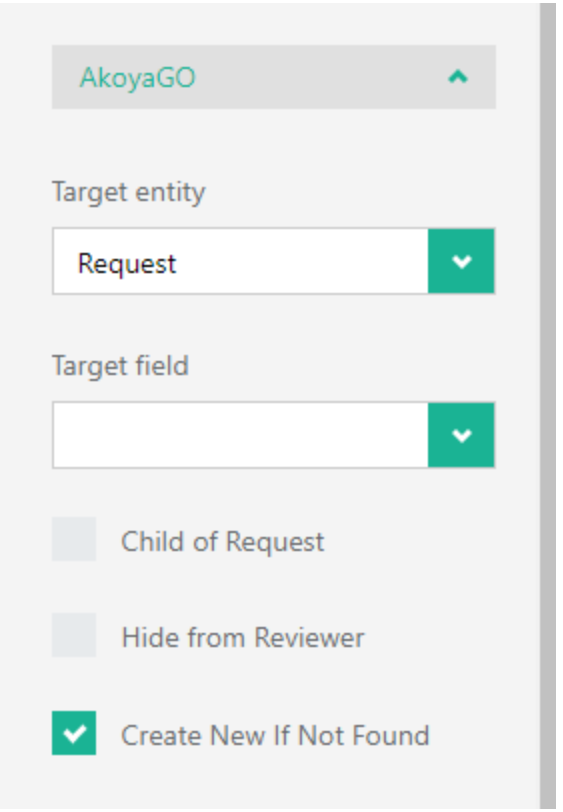
DYNAMIC PANELS

- Map to any record type associated with Request.
  - Payment and requirement
  - Primary Contact
  - College
  - Requested Scholarship
- Add custom fields, conditional fields, and hidden fields

DYNAMIC PANELS - HOW TO

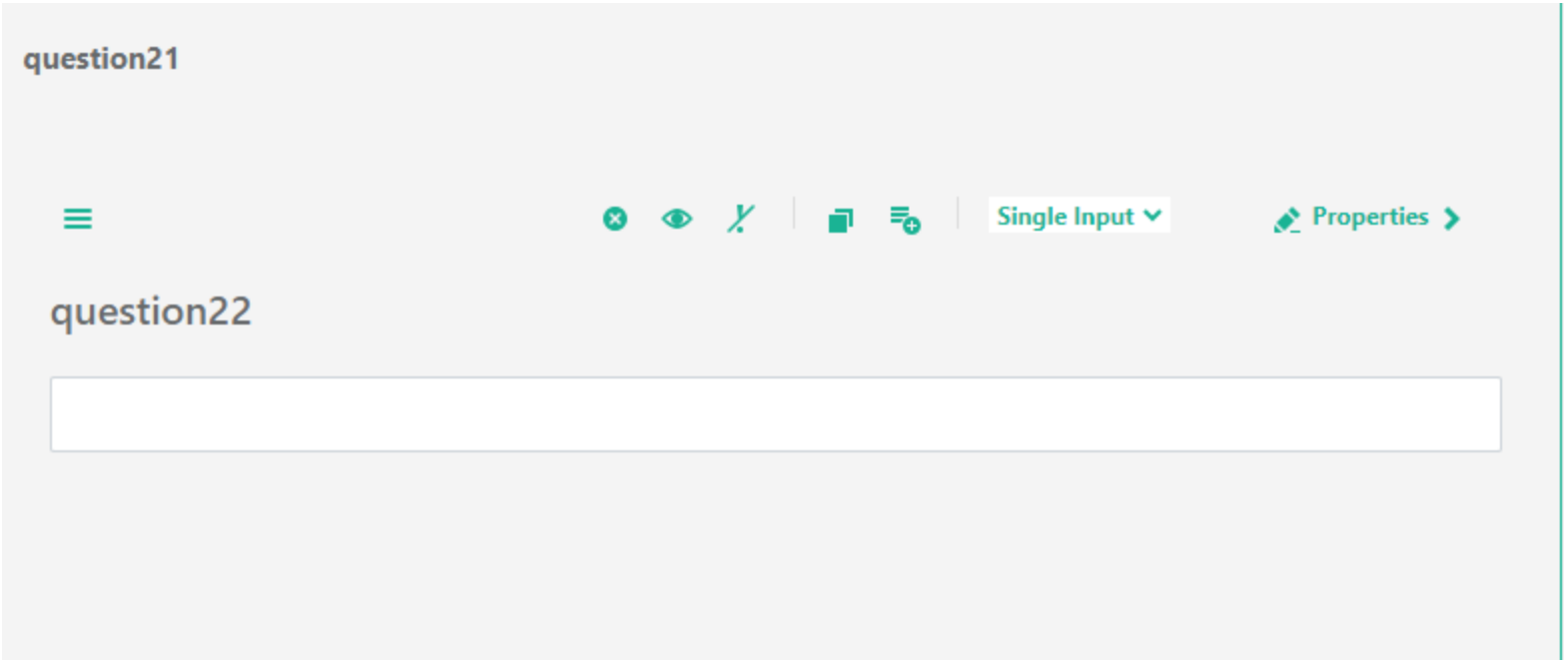
- Each panel has its own properties
- Map the panel to the lookup field ON REQUEST or check “Child of”
- Uncheck “Create New If Not Found” if you do not want this panel to create new records EVER





DYNAMIC PANELS - HOW TO

- Drag fields inside the panel, each field has its own properties
- Map the individual fields to the field on the associated record

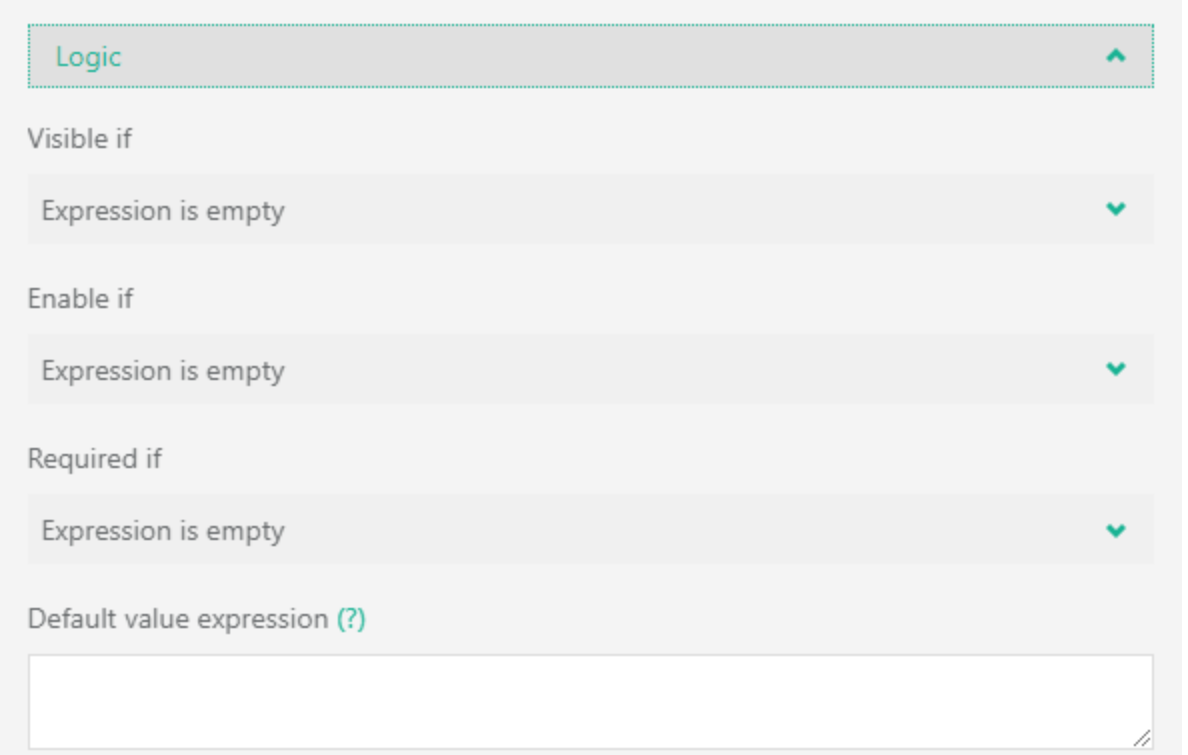


DYNAMIC PANELS FAQ

- Panels may not span pages
- All questions for that record type should be in one panel
- Do not put file upload fields in panels
- Do not “nest” panels or include any lookup fields within the panel (exception: pre-mapped panels may have these fields)

CONDITIONAL LOGIC

- Show/Hide fields, panels or pages with logical expressions
- Make fields required or enabled

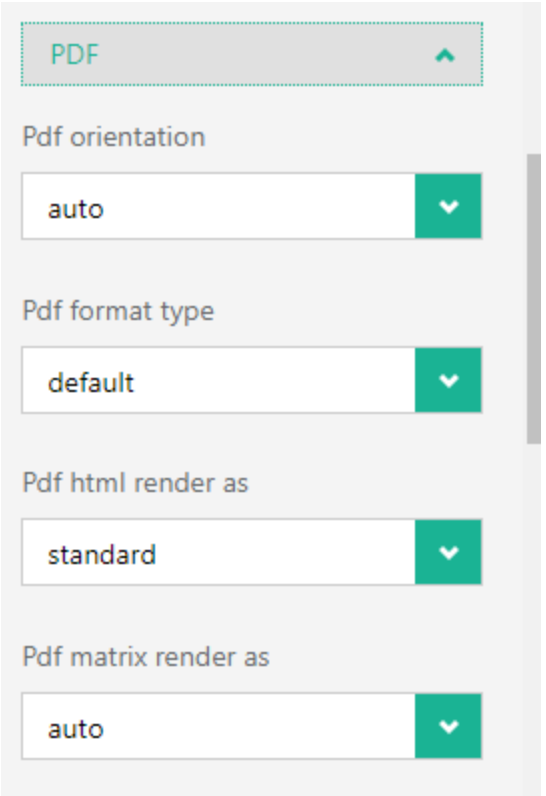


VALIDATION

- Set field limits, based on field type
- Number: min and max values
- Text: length
- Expression: values or calculations

FORM SETTINGS

- Adjust date format, PDF settings, page and question numbers, confirmation message etc.
- Important settings:



DEFAULT AND CALCULATED VALUES

- Allows you to fill read only fields with calculated values or values that auto-complete based on other data

REVERSE MAPPING

- Allows for information from contact, constituent and request to auto populate fields in GOapply

THANK YOU

Presented By

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