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## GOapply ADVANCED BUILDING TIPS & TRICKS

PRESENTED BY  
ZOEY FIFE

# 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

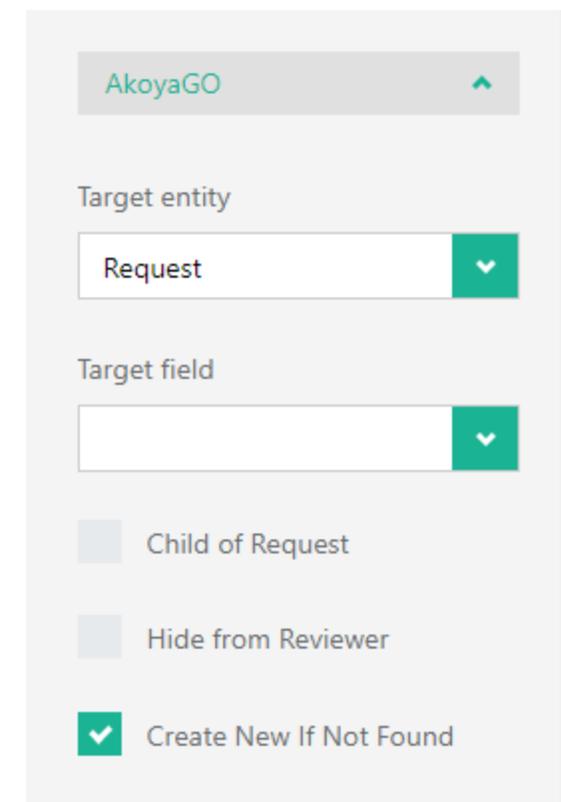
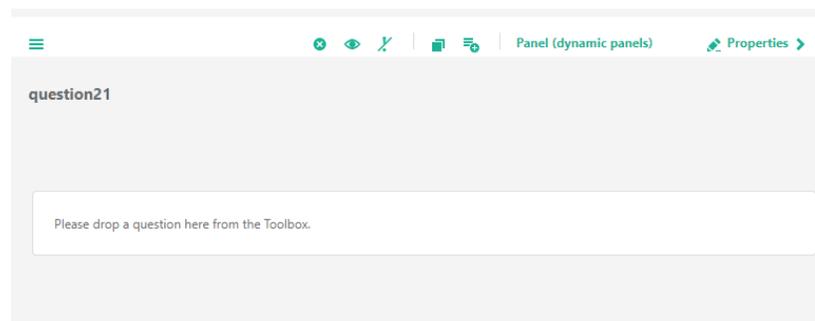
	Fiscal Sponser/Payee
	Organization (Applicant)
	Fiscal Sponser/Payee - CRA
	Organization (Applicant) - CRA
	Primary Contact
	Student Contact
	High School
	College
	Requirement - InterimReport
	Requirement - Final Report
	Recommendation
	Transcript

# 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

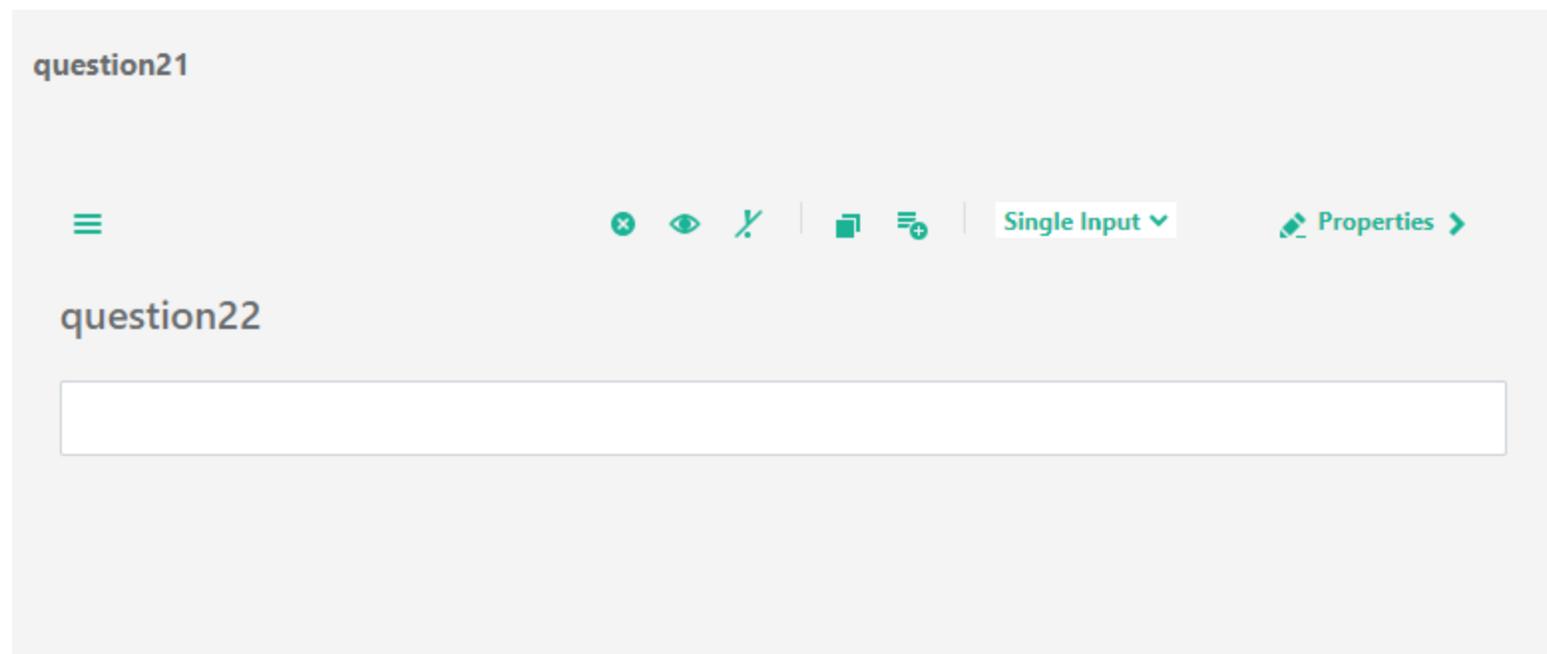
# DYNAMIC PANELS - HOW TO

- 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

The image shows a configuration panel for conditional logic. At the top, there is a tab labeled "Logic" with an upward-pointing arrow. Below the tab, there are four sections, each with a label and a dropdown menu:

- Visible if**: The dropdown menu is set to "Expression is empty" with a downward-pointing arrow.
- Enable if**: The dropdown menu is set to "Expression is empty" with a downward-pointing arrow.
- Required if**: The dropdown menu is set to "Expression is empty" with a downward-pointing arrow.
- Default value expression (?)**: Below this label is an empty text input field.

# VALIDATION

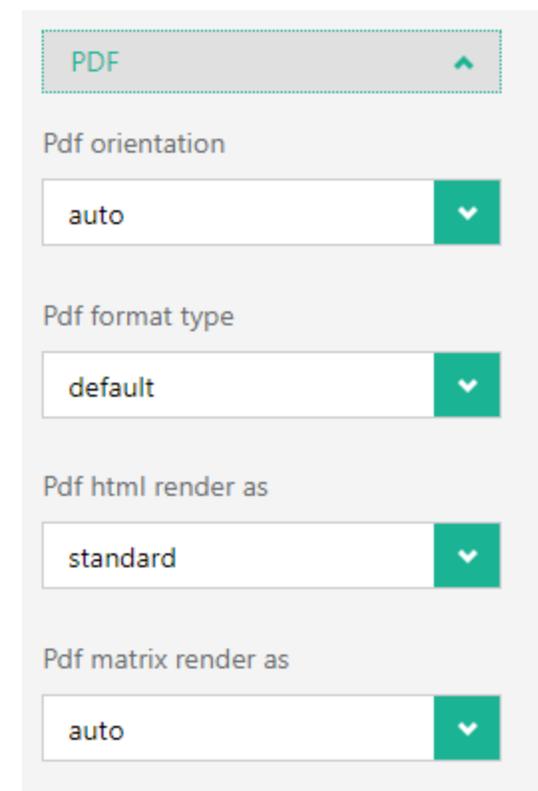
- Set field limits, based on field type
- Number: min and max values
- Text: length
- Expression: values or calculations

# FORM SETTINGS

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



A screenshot of a settings panel titled 'Data'. It features a dropdown menu labeled 'Clear invisible values' with the option 'none' selected. The panel has a light gray background and a teal header bar with the word 'Data' and an upward-pointing arrow.



A screenshot of a settings panel titled 'PDF'. It contains four dropdown menus: 'Pdf orientation' set to 'auto', 'Pdf format type' set to 'default', 'Pdf html render as' set to 'standard', and 'Pdf matrix render as' set to 'auto'. The panel has a light gray background and a teal header bar with the word 'PDF' and an upward-pointing arrow.

# 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

**Zoey Fife**

Support Tech Tier III



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