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GOapply ADVANCED BUILDING TIPS & TRICKS

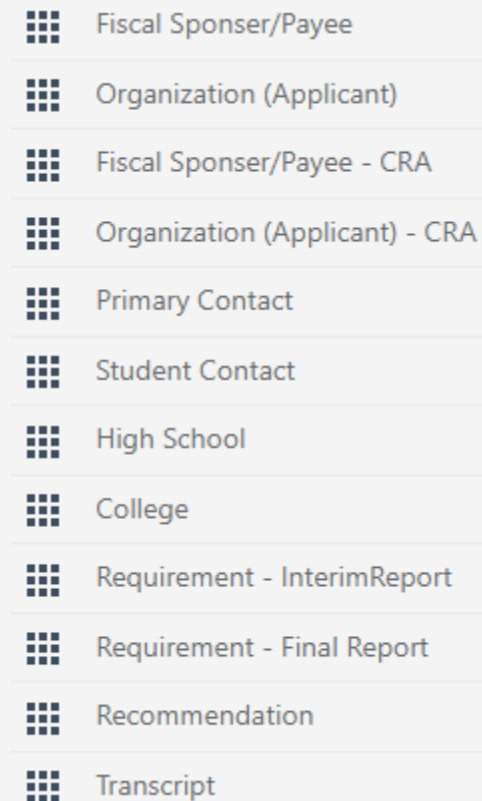
PRESENTED BY
ZOEY FIFE

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



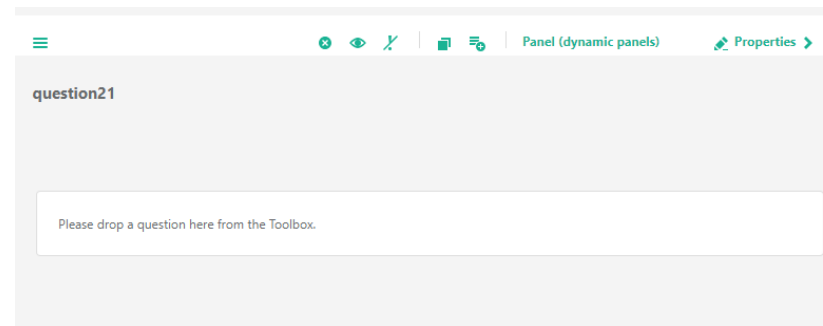
■ ■ ■	Fiscal Sponser/Payee
■ ■ ■	Organization (Applicant)
■ ■ ■	Fiscal Sponser/Payee - CRA
■ ■ ■	Organization (Applicant) - CRA
■ ■ ■	Primary Contact
■ ■ ■	Student Contact
■ ■ ■	High School
■ ■ ■	College
■ ■ ■	Requirement - InterimReport
■ ■ ■	Requirement - Final Report
■ ■ ■	Recommendation
■ ■ ■	Transcript

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

A screenshot of the AkoyaGO dynamic panel properties panel. The panel has a header with the AkoyaGO logo and an up arrow. The main content area contains the following settings:

- Target entity:** A dropdown menu with 'Request' selected and a green down arrow.
- Target field:** A dropdown menu with an empty field and a green down arrow.
- Child of Request:** A checkbox that is unchecked.
- Hide from Reviewer:** A checkbox that is unchecked.
- Create New If Not Found:** A checkbox that is checked, indicated by a green checkmark.

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

The screenshot displays a dynamic panel interface with two questions, 'question21' and 'question22'. 'question21' is at the top and contains a menu icon (three horizontal lines) and a toolbar with icons for delete (X), toggle visibility (eye), zoom (scissors), copy (two overlapping squares), and paste (plus sign). Below the toolbar is a dropdown menu labeled 'Single Input' with a downward arrow. To the right of the dropdown is a 'Properties' link with a right-pointing arrow. 'question22' is below 'question21' and contains a single input field.

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 screenshot displays the 'Logic' configuration panel in the AkoyaGO interface. It features four sections for defining conditional logic:

- Visible if:** A dropdown menu currently set to 'Expression is empty'.
- Enable if:** A dropdown menu currently set to 'Expression is empty'.
- Required if:** A dropdown menu currently set to 'Expression is empty'.
- Default value expression (?):** An empty text input field for defining a default value.

Each dropdown menu has a green chevron icon on the right side, and the entire panel has a dashed border and a light gray background.

VALIDATION

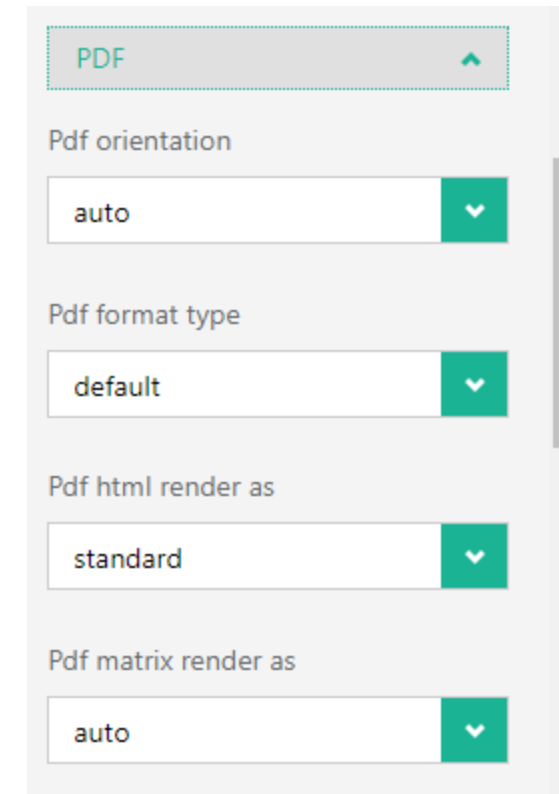
- Set field limits, based on field type
- Number: min and max values
- Text: length
- Expression: values or calculations

FORM SETTINGS

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



The 'Data' settings panel is shown with a teal header and an upward arrow. It contains a section titled 'Clear invisible values' with a dropdown menu currently set to 'none'.



The 'PDF' settings panel is shown with a teal header and an upward arrow. It contains four settings, each with a dropdown menu: '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'.

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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Support Tech Tier III



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