

# SIMPLE FORM BUILDER WEBINAR Q&A

## 1. CAN YOU MANUALLY MAP FIELDS IN SIMPLE FORM BUILDER?

- No, all mapping is automatic; you cannot manually map fields or change mapping for mapped fields.

## 2. IF A FIELD IS MAPPED TO A CURRENCY VALUE, WILL IT BE FORMATTED AS CURRENCY AUTOMATICALLY?

- Yes, fields are pre-formatted based on their CRM data type, including currency.

## 3. WHAT HAPPENS IF YOU DUPLICATE AN OPPORTUNITY—DOES IT DEFAULT TO SIMPLE FORM BUILDER?

- If you duplicate an opportunity built with Advanced Form Builder, the duplicate will also use Advanced Form Builder. If you duplicate an opportunity while it is in Simple Form Builder, it will remain in Simple Form Builder format.

## 4. WHAT IS THE MAIN BENEFIT OF SIMPLE FORM BUILDER OVER ADVANCED FORM BUILDER?

- The main benefit is automatic mapping and formatting, which reduces errors and makes form building easier.

## 5. CAN YOU CHANGE THE QUESTION TITLE?

- Yes, you can (and should!) edit the question title in the properties panel. Best practice is to name all questions.

## 6. CAN YOU PLACE QUESTIONS SIDE-BY-SIDE (IN A ROW)?

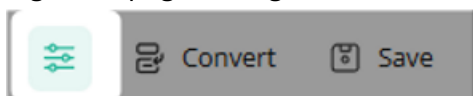
- Yes, uncheck "Display question in a new line" in the layout tab to place questions next to each other.

## 7. HOW DO YOU ADD A SIGNATURE REQUIREMENT TO A PAGE?

- Add the signature pad from unmapped fields; it will appear on the PDF. You can also add attachments and checkboxes on the same page.

## 8. HOW DO YOU ACCESS FORM PROPERTIES?

- Click outside any question on the form canvas to access form properties like layout, logo, and page settings. You can also access settings by clicking this button:



## 9. SHOULD YOU REBUILD EXISTING ADVANCED FORMS IN SIMPLE FORM BUILDER?

- It is recommended if Simple Form Builder supports your needs, as it is easier to use and reduces errors, but it is not required.

#### 10. HOW DO YOU CREATE A MATRIX (DYNAMIC ROWS)?

- Use the "multiple text boxes" field for matrices, but dynamic (user-added) rows are not yet supported.

#### 11. HOW DO YOU MAP CUSTOM FIELDS?

- Custom fields added to the CRM and marked as searchable will appear in the mapped fields list. You cannot map unmapped fields.

#### 12. CAN YOU ADD MAPPING TO AN UNMAPPED FIELD?

- No, unmapped fields cannot be mapped.

#### 13. HOW DO YOU ADD COLUMNS TO A MATRIX?

- This may require akoyaGO to enable a function; currently, only fixed rows are supported.

#### 14. IF YOU ADD A MAPPED FIELD TO CRM, HOW LONG UNTIL IT APPEARS IN SIMPLE FORM BUILDER?

- It should appear immediately after publishing and refreshing; clear your cache if it does not.

#### 15. CAN YOU OPEN SIMPLE FORM BUILDER FOR AN EXISTING ADVANCED FORM PHASE?

- No, once a phase is converted to Advanced, it cannot be reverted to Simple.

#### 16. CAN YOU DUPLICATE A SIMPLE FORM BEFORE CONVERTING TO ADVANCED?

- Yes, you can duplicate the opportunity before converting to Advanced Form Builder to retain a template.

#### 17. WILL FILE UPLOADS AND SIGNATURES APPEAR IN THE PDF?

- Yes, both will be included in the PDF (if your document and attachment settings are set to embed attachments in the PDF) and attached to the request.

#### 18. IS SIMPLE FORM BUILDER COMING TO REVIEWER FORMS?

- Yes, future reviewer forms will use Simple Form Builder by default. This functionality will be released by the end of 2025.

#### 19. HOW DOES SIMPLE FORM BUILDER WORK WITH SCHOLARSHIP AUTO-MATCHING?

- It is fully compatible; you can use either form builder for auto-match.

#### 20. CAN YOU HAVE BOTH SIMPLE AND ADVANCED PHASES UNDER ONE OPPORTUNITY?

- Yes, you can mix phases within an opportunity.

#### 21. WHEN SHOULD YOU USE ADVANCED FORM BUILDER INSTEAD OF SIMPLE?

- Convert to Advanced if you need to map to child records, custom entity lookups, or tables beyond request, constituent, contact, or program.

#### 22. HOW DO TARGETED VIEWS WORK FOR LOOKUP FIELDS?

- Targeted views for lookups will be available in Simple Form Builder after an upcoming update; currently, use system views for dropdowns.

#### 23. DO ALL COMPONENTS APPEAR IN THE PDF?

- Most do, but images may have limitations, and Excel files are not embedded. Use the image field (not HTML) for best PDF results.

#### 24. CAN YOU MAP THE RICH TEXT EDITOR FIELD?

- No, the Rich Text Editor is for unmapped essay questions only.

#### 25. HOW QUICKLY CAN YOU BUILD AND SHARE A DRAFT APPLICATION?

- Users reported building a draft and sharing it with colleagues in about 1.5 hours.
- Very simple forms (not using excessive branching logic) can be created in a matter of minutes.