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## Online Form Designer – Rule Builder Tutorial (part 1)

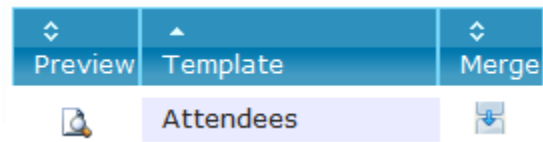
This tutorial assumes you have reviewed the **Getting Started** tutorial.

This Tutorial will show you the following:

- Hide or Show Fields with the Form Loading Event.
- Hide or Show Fields based on Time.
- Hide or Show Fields based on a Trigger.
- Hide or Show an entire block of Fields with one Rule.
- Display a Message based on a Rule.

Let's Get Started!

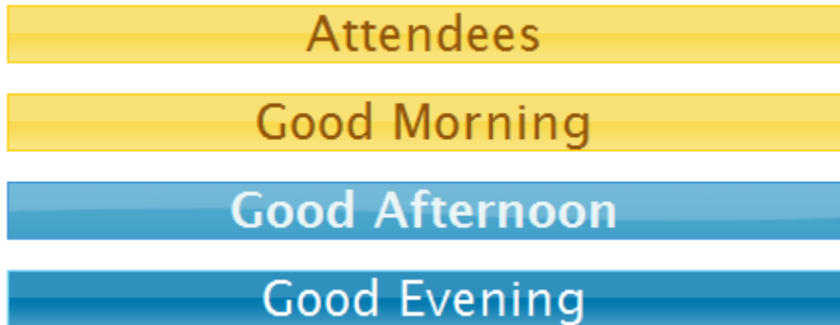
1. **Login** from the home page.
2. From within the Form **dialog** click the **New Form** bar.
3. **Click** the **OK** button.
4. Click the **Template** tab at the top of the page.
5. Locate the **Attendees** template and **click** the **Merge** button (as shown below). The Attendees template is merged into your existing Form design.



6. Hover over the **Attendees** widget in the Form and click the **Plus** sign to insert a duplicate label. The Web Form is updated. Click the Plus sign until you have 4 labels as shown below.



7. Hover over the **second** Attendees label and click the Pencil. Change the Caption to **Good Morning** and the Style to Soft. Click **Save Changes**.
8. Change the Caption of the **third** label to **Good Afternoon** and the Style to Medium. Click Save Changes.
9. Change the Caption of the **fourth** label to **Good Evening** and the Style to Strong. Click Save Changes. These labels will be used to greet Customers based on the time of day. Your Labels should look like the following.



10. Click the **Widget** tab at the top of the page. Drag & Drop two lists on to the Web Form design.
11. Hover over one of the lists and click the Pencil. Change the Caption to **Size of your Company**. Enter the following values: **Select...,1 to 10 Employees,More than 10**. Click **Save Changes**.
12. Hover over the other list and click the Pencil. Change the Caption to **What is your Role**. Enter the following values: **Select...,Decision Maker,Management**. Click **Save Changes**.
13. Notice that for each List we added a **Select...** option. This was done on purpose so that when the user selects a valid option, the script will detect the list change and trigger a Rule which could hide or show a Field.

14. Drag & Drop the Widgets so your Form looks like this:

The screenshot shows a web form layout with the following elements from top to bottom:

- A yellow button labeled "Attendees".
- A yellow button labeled "Good Morning".
- A blue button labeled "Good Afternoon".
- A blue button labeled "Good Evening".
- A label "Size of your Company:" followed by a dropdown menu with "Select..." and a plus sign.
- A label "What is your Role:" followed by a dropdown menu with "Select..." and a plus sign.
- Text: "More than one employee? Click a Plus sign to insert another row."
- A green button labeled "Start".
- A label "Lunch:" followed by a dropdown menu with "Select..." and a plus sign.
- A label "First Name:" followed by a text input field and a plus sign.
- A label "Email Address:" followed by a text input field and a plus sign.
- A red button labeled "End".
- A blue button labeled "Submit".

15. Click the **Rules** tab at the top of the page. Rule Builder **Help** appears in the **East** pane. Your Web Form is visible in the Center pane. The 'If this is this then this' **Rule Builder** appears in the **South** pane.

The screenshot shows the Rule Builder interface with the following structure:

If this (trigger)  is (filter)  this (criteria)  then (action)  this (field)

The dropdown menus are populated with the following values:



- is (filter): is
- then (action):
- this (field): Attendees


16. In the **'If this (trigger)'** list select **\*Form Loading** (near the bottom of the list). This special option allows you to hide or show something before the Form is visible.

17. In the **'then (action)'** list select **Hide**.

18. In the **'this (field)'** list select **Good Morning**.

19. Click the Plus sign  to insert the Rule. The Rule Builder should look like this:

If this (trigger)	is (filter)	this (criteria)	then (action)	this (field)	
*Form Loading	is	Loading	Hide	Good Morning	
*Form Loading	is	Loading	Hide	Good Morning	

20. In the **'this (field)'** list select **Good Afternoon** and click the Plus sign . In the **'this (field)'** list select **Good Evening** and click the Plus sign. Notice how a new Rule appears directly under the first row, always keeping the rules in view.

*Form Loading	is	Loading	Hide	Good Evening	
*Form Loading	is	Loading	Hide	Good Afternoon	
*Form Loading	is	Loading	Hide	Good Morning	

21. In the **'If this (trigger)'** list select **\*Form Time** (near the bottom of the list). This special option allows you to hide or show something based on Time.

22. In the **'is (filter)'** list select **Morning**. In the **'then (action)'** list select **Show**. In the **'this (field)'** list select **Good Morning**. Click the Plus sign to insert the Rule.

23. Select **Afternoon** from the **'is (filter)'** list and then **Good Afternoon** from the **'this (field)'** list. Click the Plus sign.

24. Select **Evening** from the **'is (filter)'** list and then **Good Evening** from the **'this (field)'** list. Click the Plus sign. The new rules should look like this:

*Form Time	Evening		Show	Good Evening	
*Form Time	Afternoon		Show	Good Afternoon	
*Form Time	Morning		Show	Good Morning	

25. Click **Save Changes**. Then click **Preview** to test the Rules. A greeting is displayed below Attendees, based on the Time of the computer. To test the other greetings, change the time of your Computer and click the Browser refresh button (or press **F5** on your keyboard).

The hour range for the available options is as follows:

- **Morning** is from 5AM to 11AM.
- **Afternoon** is from 12PM to 5PM.
- **Evening** is from 6PM to 11PM.
- **Latenight** is from 12AM to 4AM.

**Attendees**

**Good Evening**

Size of your Company:  
Select... [v] [↔]

What is your Role:  
Select... [v] [↔]

More than one employee? Click a Plus sign to insert another row.

Lunch: [Select... [v] [↔]]    First Name: [ ] [↔]    Email Address: [ ] [↔]    [+] [?]

**Submit**

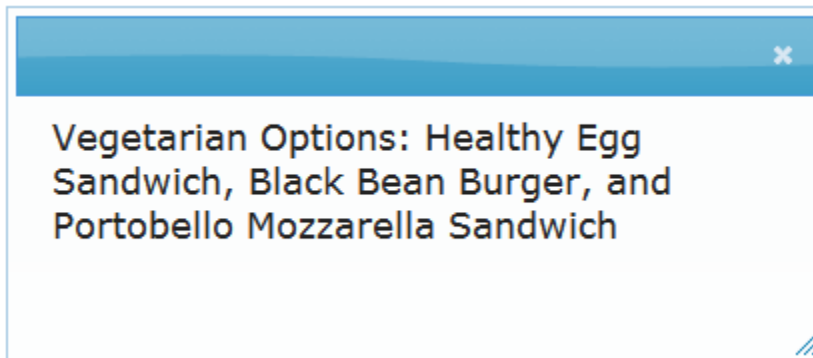
26. Let's create a Rule that displays Lunch options for Vegetarian. In the **'if this'** list select **Lunch**.

27. In the **'this (criteria)'** list select **Vegetarian**.

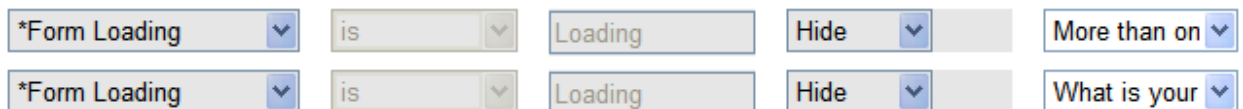
28. In the **'then (action)'** list select **Show Message**.

29. Enter the following text in the Message textbox: **Vegetarian Options: Healthy Egg Sandwich, Black Bean Burger, and Portobello Mozzarella Sandwich**. Click the **X** to close the dialog. The Message is passed to the **'this (field)'** textbox.

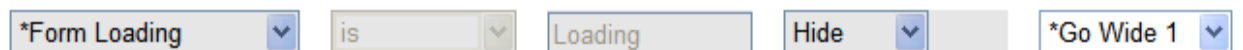
30. Click **Save Changes**. Then click **Preview** to test the Rules. Select **Vegetarian** from the Lunch list. The lunch options appear in a Message dialog.



31. In the **'If this'** list select **\*Form Loading**. In the **'then (action)'** list select **Hide**. In the **'this (field)'** list select **What is your Role**. Click the **Plus** sign to insert the Rule.
32. In the **'If this'** select **\*Form Loading**. In the **'this'** list select **More than one employee**. Click the Plus sign to insert the Rule. The new rules should look like this.



33. In the **'this (field)'** list select **\*Go Wide 1**. Click the **Plus** sign to insert the Rule. The new rule should look like this.



**Tip:** Anything in-between **Start** Start and **End** End tags may be **hidden with one Rule**. Where a Field does not have a Caption like the Go Wide widget, a star followed by a system generated Caption is created (**\*Go Wide 1**). Field Captions in the **'this (field)'** list are in the same physical order as your Web Form. If there was another Go Wide you would see \*Go Wide 2 and so on.

34. Click **Save Changes** and then **Preview** to test the Rules. **The Role** list, **More than one employee** instructions, and the **\*Go Wide 1** row is hidden. Your Web Form should look like this:

Attendees

Good Evening

Size of your Company:  
Select... ▼

Submit

35. Select **Size of your Company** from the **'If this'** list. Select **1 to 10 Employees** from the **'this (criteria)'** list. Select **Show** from the **'then (action)'** list. Select **What is your Role** from the **'this (field)'** list. Click the **Plus** sign to insert the Rule.

Size of your Company ▼ is ▼ 1 to 10 Employees ▼ Show ▼ What is your ▼

36. Select **More than 10** from the **'this'** list. Select **Show** from the **'then'** list. Click the **Plus** sign to insert the Rule.

Size of your Company ▼ is ▼ More than 10 ▼ Show ▼ What is your ▼

37. Click **Save Changes** and then **Preview** to test the Rules. Selection of **More than 10** reveals the Role list! This type of functionality is known as Conditional Logic or Branching.

Attendees

Good Evening

Size of your Company:  
More than 10 ▼

What is your Role:  
Select... ▼

Submit

38. Select **What is your Role** from the **'If this'** list. Select **Decision Maker** from the **'this (criteria)'** list. Select **Show** from the **'then (action)'** list. Select **More than one employee** from the **'this (field)'** list. Click the **Plus** sign to insert the Rule. Select **\*Go Wide 1** from the **'this field'** list. Click the **Plus** sign to insert the Rule.

What is your Role: ▾	is ▾	Decision Maker ▾	Show ▾	More than on ▾
What is your Role: ▾	is ▾	Decision Maker ▾	Show ▾	*Go Wide 1 ▾

39. Select **Management** from the **'this (criteria)'** list. Select **More than one employee** from the **'this (field)'** list. Click the **Plus** sign to insert the Rule. Select **\*Go Wide 1** from the **'this field'** list. Click the **Plus** sign to insert the Rule.

What is your Role: ▾	is ▾	Management ▾	Show ▾	More than on ▾
What is your Role: ▾	is ▾	Management ▾	Show ▾	*Go Wide 1 ▾

40. Click **Save Changes** and then **Preview** to test the Rules. Select **1 to 10 Employees** from the **Size of your Company** list. The Role list appears. Select a Role from the list. The Instructions and Go Wide fields appear. Depending on the time of day the Greeting appears under the Attendees label. Selection of Vegetarian in the Lunch list displays the options available.

41. Well if you made it this far, give yourself a pat on the back! You have just created 16 Rules that hide or show Fields in bulk, display them based on the time of day, show or hide fields based on a change in a list and so much more.

This concludes the **Rule Builder** Tutorial (part 1).