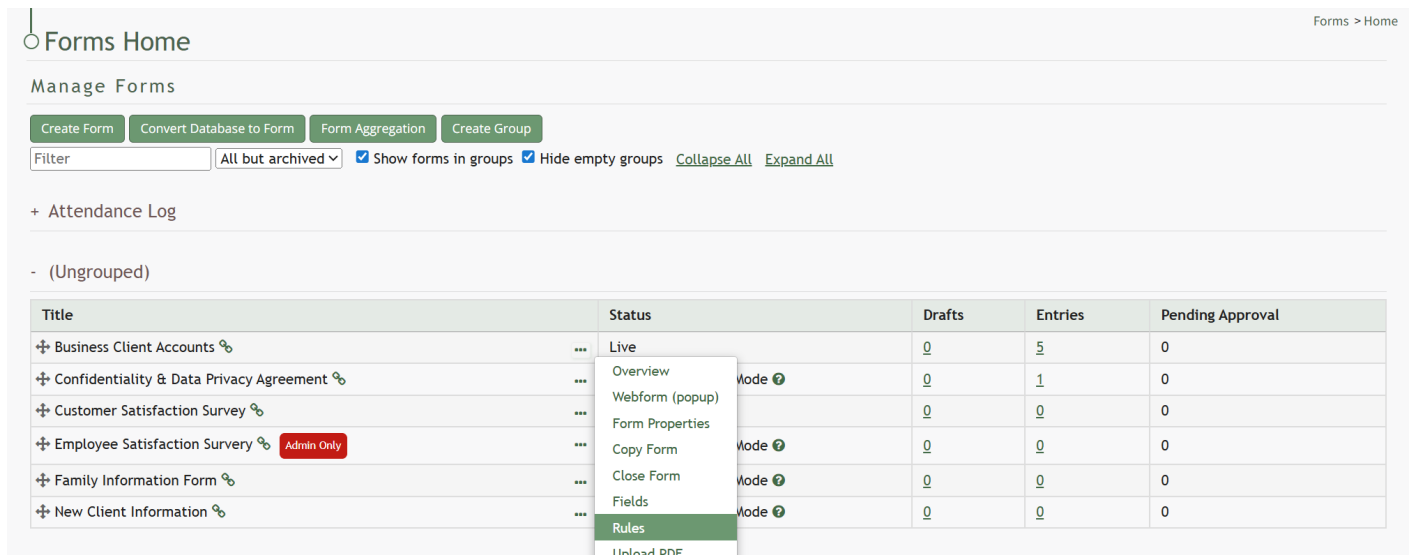


Create a New Form Field Rule

To add a form field rule, go to the Home Page of the Forms Module. Click the three dot icon to the right of the form title that you want to create a rule for opening the Form context menu. Select “Rules”.

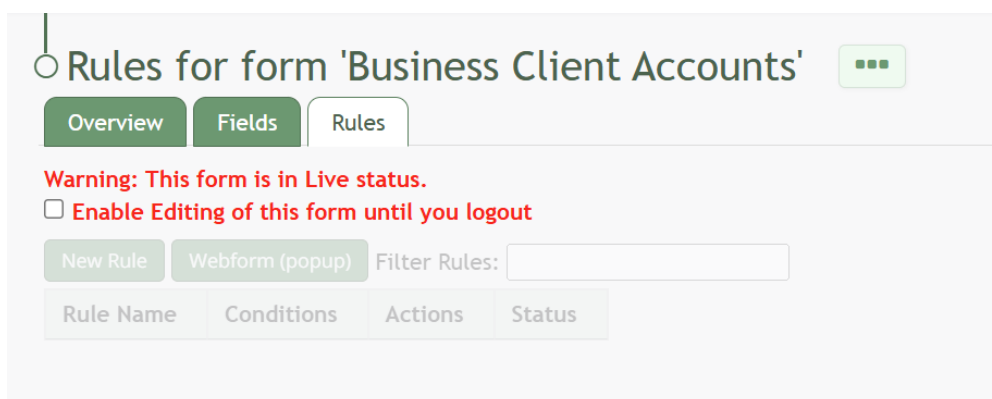


The screenshot shows the 'Forms Home' page. At the top, there are navigation buttons: 'Create Form', 'Convert Database to Form', 'Form Aggregation', and 'Create Group'. Below these are filter options: 'Filter', 'All but archived', 'Show forms in groups', 'Hide empty groups', 'Collapse All', and 'Expand All'. A section titled '+ Attendance Log' is visible. Below that, a section titled '- (Ungrouped)' contains a table of forms. The table has columns: Title, Status, Drafts, Entries, and Pending Approval. The 'Business Client Accounts' form is highlighted, and its context menu is open, showing options: Overview, Webform (popup), Form Properties, Copy Form, Close Form, Fields, Rules (highlighted), and Upload PDF.

Title	Status	Drafts	Entries	Pending Approval
+ Business Client Accounts	Live	0	5	0
+ Confidentiality & Data Privacy Agreement	Overview	0	1	0
+ Customer Satisfaction Survey	Webform (popup)	0	0	0
+ Employee Satisfaction Survey	Form Properties	0	0	0
+ Family Information Form	Copy Form	0	0	0
+ New Client Information	Close Form	0	0	0
	Fields	0	0	0
	Rules			
	Upload PDF			

This opens the Rules Tab containing the Rule Table.

If your form is already live, you will be asked to enable editing before you can add a new rule to your form.



The screenshot shows the 'Rules for form 'Business Client Accounts'' page. At the top, there are navigation tabs: 'Overview', 'Fields', and 'Rules'. Below the tabs, there is a warning message: 'Warning: This form is in Live status.' and a checkbox labeled 'Enable Editing of this form until you logout'. Below the warning, there is a 'New Rule' button and a 'Filter Rules:' input field. At the bottom, there is a table with columns: 'Rule Name', 'Conditions', 'Actions', and 'Status'.

After enabling editing (if required), select the “New Rule” button opening the New Form Rule Modal.

New Form Rule ✕

Rule Name *

Status *
Active ▾

Conditions +
Always run (No conditions have been defined)

Actions +
No Actions Defined

Save Cancel

Input the Rule Name and Rule Status (both required fields).

Click the plus icon to the right of Conditions to add a condition to the rule, expanding the section for the input of the trigger, what must be true, and what happens if it is true.

Conditions

Shelf ▾
Is Equal To ▾
Enter Value ▾

Case Sensitive

Save Cancel

Once the condition has been entered, select “Save” to return to the New Form Rule Modal.

Conditions

Shelf = 'Floor' ✔ ✖ +
+

The condition created will show in the modal.

As many conditions as desired can be entered, as well as none at all.

Click the plus sign to the right of Actions to add an action to the rule, expanding the section for the configuration of the action to be taken when the conditions are met.

Once the rule has been entered, select “Save” to return to the New Form Rule Modal. The action will now show in the modal.

New Form Rule ✕

Rule Name *
Shift Change

Status *
Inactive ▾

Conditions

Last Name is not blank 🔗 ✖ +
+

Actions +

- Configure Signature Field: must be signed by any of: 🔗 ✖

Save Cancel

Select "Save". A popup will confirm that the rule was saved stating, "Rule was saved."



The rule will now show in the Rules Table.

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