

Workflow Step - Conditional Ruleset

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Introduction

The Conditional Step allows you to conditionally route your workflow to one or more paths based on one or more rules. You can even customize the conditional logic for these rules!

Please Note: This feature is being slowly rolled out to all Enterprise and Compliance Cloud customers. Over the next several weeks, we will be progressively rolling out the new Workflow experience to customers on these plans. Keep an eye out for the "New" flag in your FormAssembly account to know when you can jump into this feature. It is not possible to request early access to this feature. We apologize for any inconvenience.

To add this Step to your workflow, click the "Add Step" button on your Map and then select Add a Conditional from the dropdown menu. This will auto-populate two Path Cards in the Properties Panel. Path Cards contain the configuration of each Path.

You can edit or delete a Conditional Step at any time by selecting it on the Map and opening the Properties Panel.

Please Note: Deleting a Conditional Step will delete all Paths and all Steps on these Paths as well.

Conditional Steps consist of five main parts:

- **Conditional** - The main body of the Step. This is where you can add, edit, and remove Paths, along with configuring the conditional logic applied to them.
- **Paths** - These are branches stemming out from the conditional. The respondent will only follow one of the Paths as they progress through the workflow. Paths can be added or removed, but you will begin with two Paths by default.
- **No Conditions Met Path** - This is the Path that a respondent will follow if none of the other conditions/rules have been met. This Path is auto-populated and cannot be deleted without deleting the entire Step.
- **Rules** - Rules are what determine which Path a workflow will take. The respondent will be sent down the first Path which equates to "true". Rules appear in rows within the Path Card and are each identified by a letter icon. You can add multiple rules to any Path.
- **Set Condition** - This section allows you to select the conditional logic that will be applied to a set of rules in

order for the respondent to follow that Path. You will only see this option when you add more than one set of rules to a singular Path.

Properties Panel Configuration

Adding this new Step will automatically open the Properties Panel so that you can configure the Step. The Properties Panel for this Step contains the following tabs: Paths and Description

You can delete any Step by opening the Properties Panel for the Step and clicking the red "Delete Step" button at the bottom.

Paths Tab

This tab contains a list of **Path Cards**, each of which contains the configuration for one of the Paths. You will begin with two Path Cards by default and you can add more by clicking the "Add Path" button (see the image in the previous section).

You must configure the first default Path Card completely by defining rules and setting conditions in order for the Paths to be valid. You must also configure any additional Path that you add. The final Path Card will be the "No Conditions Met" Path. This Path is pre-configured with conditions/rules and does not require any additional configuration. You can update the title of this path by clicking Configure on the Path Card. Your respondents will be routed down the *first* Path to equate as true, according to the order of the Path Cards (or as they are displayed left to right in the Map). This means that if a respondent meets the conditions for two Paths, they'll go down whichever they meet the conditions of *first*.

On each Path Card, you'll see the Path's status icon, name, and buttons to delete or configure the Path.

Clicking "Configure" will expand the Path Card so that you can set the name and rules for the Path. Once the card has been opened, you can click Close to collapse the card.

Path Name

You can change the name of the Path and customize it to your needs if you choose.

Rule Status

The status will be "Invalid" by default until all of the required rule fields have been configured. Once everything has been configured, the status will update to "Valid" and the color will change from yellow to green.

Define Rules

Each row (rule) in this section is uniquely identified by a letter icon. To set a new rule, you'll first select a source which can be either a form field or a formula.

- Form Field - A dropdown with a list of all form fields from **all** forms above the current Step in the workflow.
- Formula - A text field where you can type in a formula. You also have the ability to build a formula using the formula editor by clicking on the blue "f." If you are not yet familiar with the Formula Editor, then [you can learn more about using the Formula Editor to create formulas here first](#).

Please Note: The Formula Editor in the new Workflow Builder has some additional aliases when compared to the form-specific Editor. Namely, you can now select fields and aliases from all previous forms when building your formulas. Selecting these previous forms' fields and aliases in the Formula Editor will create a "super-alias", an alias that works across multiple forms and steps. Super-aliases have the following format:

```
%%[workflow step #]![field alias]%%
```

After you have selected your source field, you'll need to choose an **operator** and a **value**. An operator determines how the source field will be compared to the value. The value is a number or text that you will compare to the source field. Think of this entire section like one large formula with the following format:

```
If [source field/formula]+[operator]+[value]="true", then go down this path. Otherwise,
move to the next Path Card.
```

So one example of this would be:

```
If [the Zip Code field in form one] [equals] [90210] then continue down this path.
```

Additional Notes for Rules

- If you choose a form field as your source and a text field as your source field you can use the Formula Editor, or enter text in the Value box to determine the functionality of the rule.
- If you choose a multiple-choice field as your source field then you'll be given a list of options from the source field to use for the value.
- The "Contains" operator will only work with multi-select fields.
- If you select the "Between" operator, you will be able to set two values and create a range. The two values you enter in the fields will be included in this range. So if you choose the values "1" and "9" then any number from 1-

9 will be valid.

Set Condition

If you create more than one rule on a Path Card, you will have the ability to set the condition. Conditions allow you to add even more detail to your rules by determining when to continue down the path. You can choose to continue down the Path when all of the rules on the Path Card are satisfied (Rule A and Rule B) when any of the rules are satisfied (Rule A or Rule B), or you can set custom logic (such as [Rule A and Rule B] or Rule C).

If you choose custom logic and reference a rule, you will not be able to delete that rule without first removing it from the custom logic. Deleting a rule can also change the letter icons associated with the remaining rules. The default conditions will update automatically to adjust for this.

In addition, you will see an error message if you do any of the following:

- If you reference a rule that doesn't exist in your custom conditional logic
- If your custom conditional logic formatting is incorrect
- If an existing rule is not referenced in the custom conditional logic

Custom conditional logic should use the following format:

```
([rule letter] [operator] [rule letter])
```

Here are some examples:

```
(A AND B)  
(A OR B)  
(A AND B) OR (C AND D)
```

Description Tab

This tab handles the details of the Step, including the Step Name and Step Description.

Step Name

This field allows you to give the Step a custom name, which can help you differentiate between your Steps. It has a default value of "Conditional" until manually changed.

Step Description

You can use this field to add a description to your Step.

Feedback

FormAssembly Workflow Feedback

Please use this form to submit feedback regarding your experience with FormAssembly Workflow or submit a Workflow feature or improvement request.

First Name

Last Name

FormAssembly Username or Email Address *

How are you currently using Workflow?

What type of request would you like to submit? *

- Workflow Feature or Improvement Request
- Report Feedback or an Issue with Workflow

Workflow Feedback or Issue

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Other Topic

Upload an Image or Screenshot

 No file selected