

# Smart Conditional Logic

## Blue Form Builder plugin

### User Guide

Version 1.0

# Table of Contents

<b>I) Introduction.....</b>	<b>2</b>
<b>II) Where to Find Plugin.....</b>	<b>3</b>
<b>III) How to Use.....</b>	<b>4</b>
1. Conditions.....	5
2. Actions.....	9
a) Show fields.....	10
b) Hide fields.....	12
c) Send email to.....	13
d) Redirect to.....	14
d) Set value of.....	14
<b>IV) Example.....</b>	<b>16</b>
1. Show fields.....	16
2. Hide fields.....	19
3. Send email to.....	21
4. Redirect to.....	23
5. Set value of.....	25
<b>V) Conditional Logic with Special Fields.....</b>	<b>26</b>
1. Multiple Choice fields (or elements).....	26
2. Subscribe field.....	28
3. Toggle field.....	30
4. Single Checkbox field.....	31
5. Star Ratings field.....	32
6. Fields with no label.....	33
<b>VI) Support.....</b>	<b>37</b>

## I) Introduction

**Smart Conditional Logic** is a plugin of **Magento 2 Blue Form Builder**. After installation, it will be integrated with existing Blue Form Builder extension on your website.

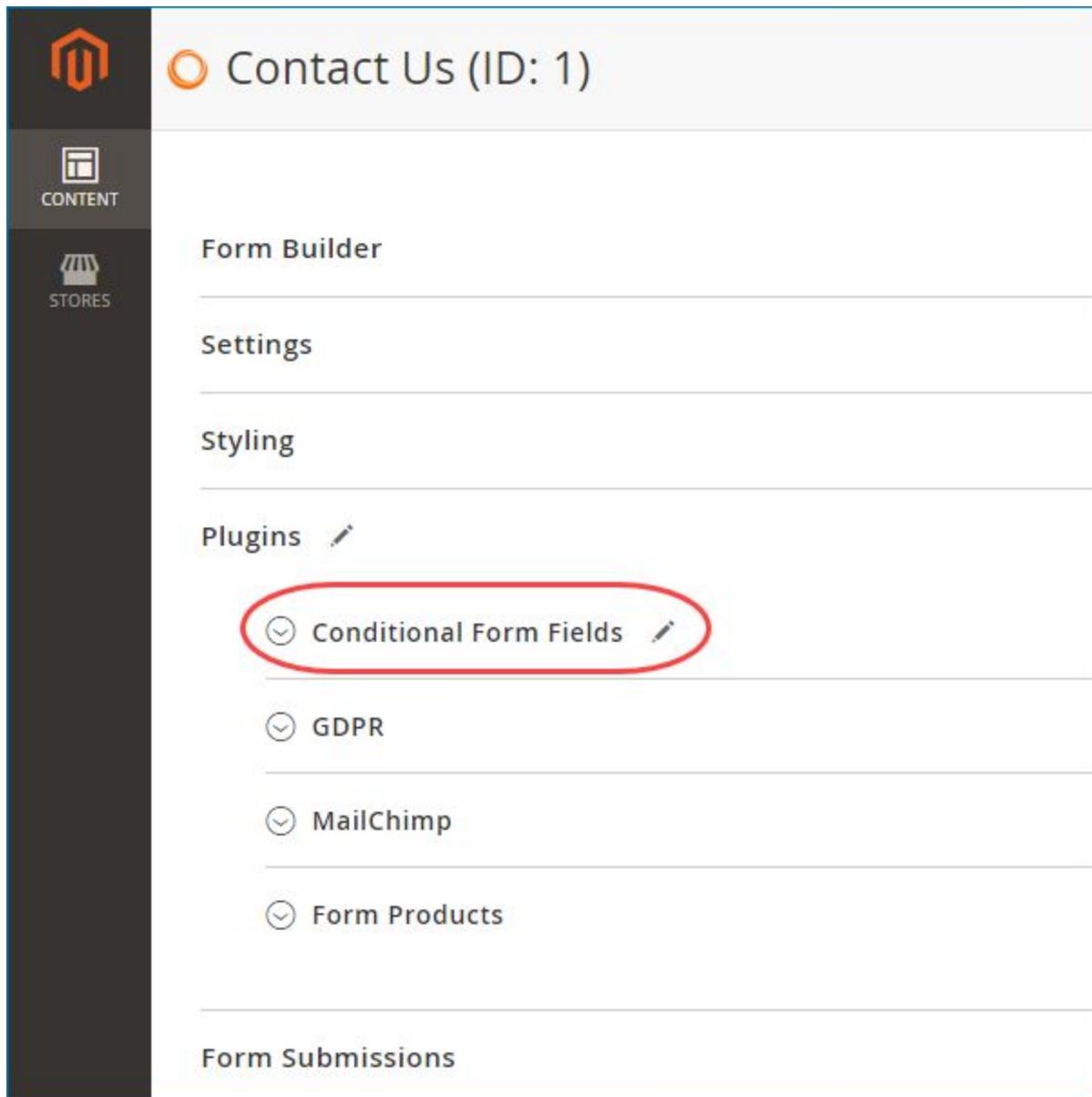
**Smart Conditional Logic** ensures that your forms are smart, relevant and effective, save you and your users time and collect the data you want. With this feature, your forms will dynamically change based on what customers fill out.

You can use **Smart Conditional Logic** plugin to:

- Show/hide fields
- Send emails to right people in your company
- Redirect to another page after form submission
- Set value of other fields

## II) Where to Find Plugin

After installing our plugin, you can find it in the settings of every form. Open a form's settings. Then click on "**Plugins**" tab. You will see the plugin in **Conditional Form Fields** tab.



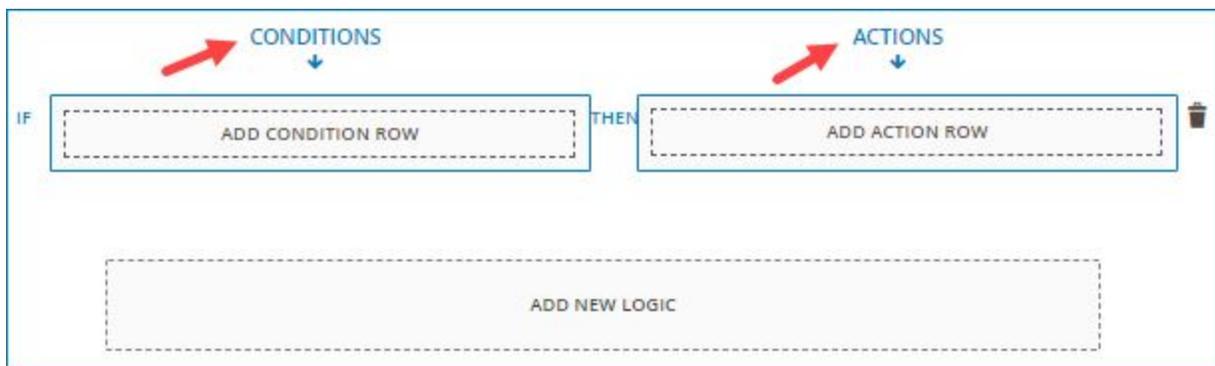
## III) How to Use

Now that you've found the plugin, click to open **Conditional Form Fields** tab:



Click on **ADD NEW LOGIC** to add a new conditional logic. There are two columns:

**Conditions** and **Actions**.



You can add more conditional logics by clicking **ADD NEW LOGIC** or delete a logic by clicking the recycle bin icon.

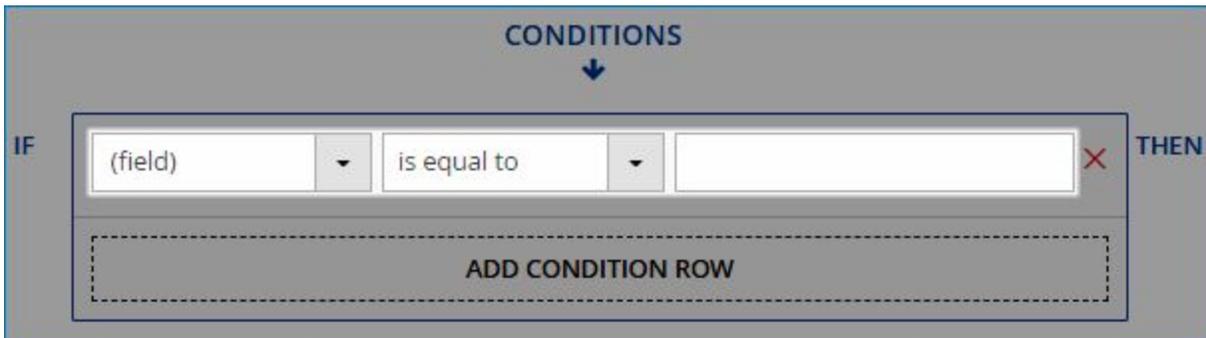
## 1. Conditions

In this column, you set the conditions for an action to happen.



The screenshot shows a box titled "CONDITIONS" with a downward arrow. Below it, on the left, is the word "IF". To the right of "IF" is a dashed rectangular box containing the text "ADD CONDITION ROW".

- Click on **ADD CONDITION ROW** to add a new condition. Then you will see this:



The screenshot shows the "CONDITIONS" section with a downward arrow. Below it, on the left, is the word "IF". To the right of "IF" is a row of three elements: a dropdown menu with "(field)" selected, a dropdown menu with "is equal to" selected, and a text input field. To the right of the text input field is a red "X" icon. To the right of the "X" icon is the word "THEN". Below this row is a dashed rectangular box containing the text "ADD CONDITION ROW".

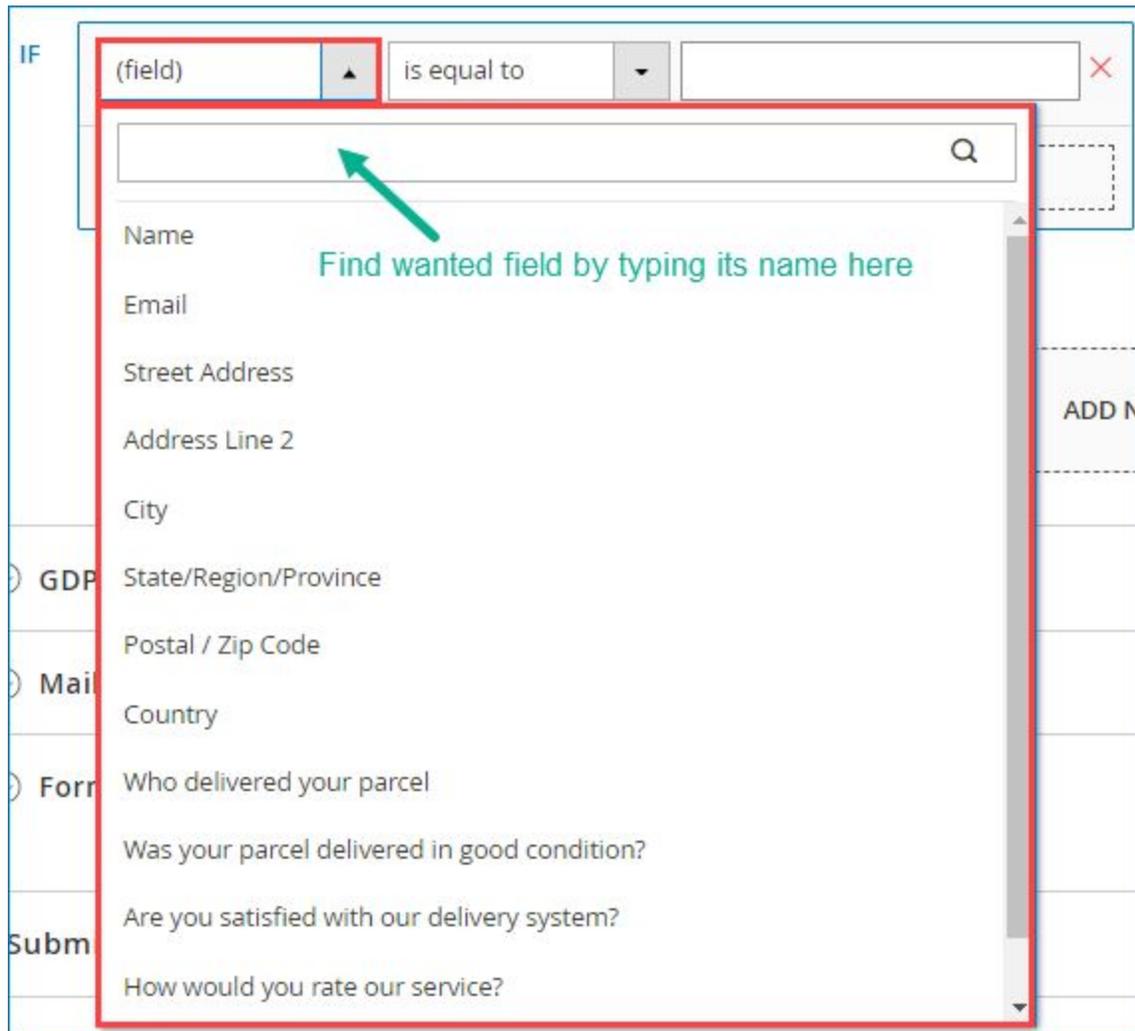
- You can add more conditions by clicking **ADD CONDITION ROW** or delete a condition by clicking the red cross icon.



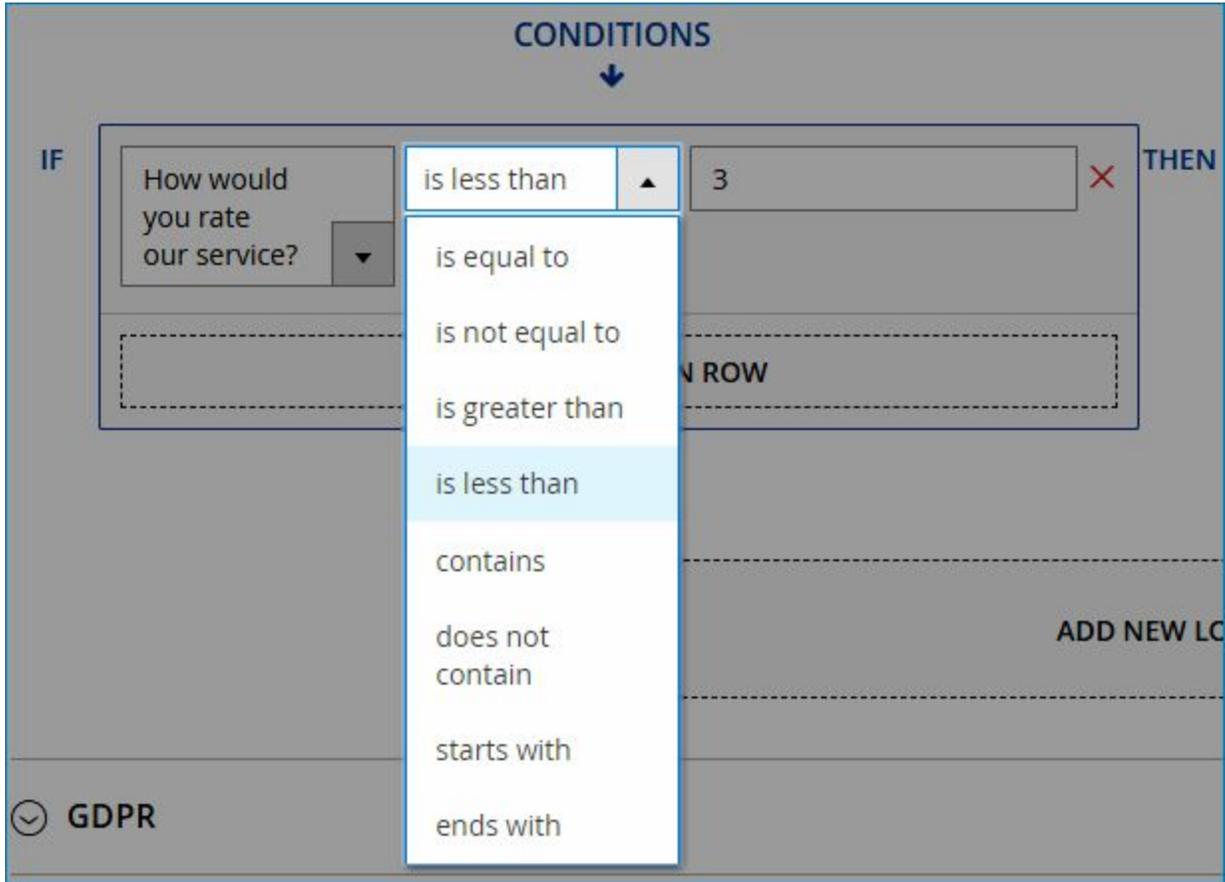
The screenshot shows the "CONDITIONS" section with a downward arrow. Below it, on the left, is the word "IF". To the right of "IF" is a row of three elements: a dropdown menu with "(field)" selected, a dropdown menu with "is equal to" selected, and a text input field. To the right of the text input field is a red "X" icon. To the right of the "X" icon is the word "THEN". Below this row is a dashed rectangular box containing the text "ADD CONDITION ROW". A green arrow points from the text "Delete a condition" to the red "X" icon. Another green arrow points from the text "Click here to add more conditions" to the "ADD CONDITION ROW" button.

+ In the first field, you will select the form field you want to make conditional from a drop-down menu. The form fields in the drop-down menu are listed by label (that

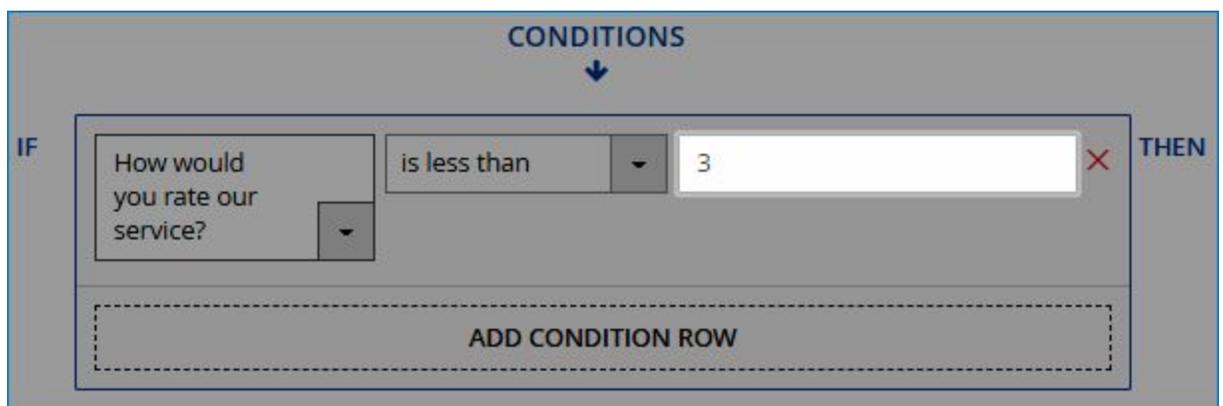
you decide in their settings) and ordered based on their order in the form. You can find your desired fields quickly by typing their names in the search box (with spyglass icon) at the top of the drop-down menu.



- + The second field consists of all conditions that you can apply. Click on the drop-down button to see a drop-down list containing these conditions.



- + The last field is where you enter a value for the condition:



- If you add another condition, you will see the word **AND** between two conditions. Click on it and a drop-down menu will appear containing 2 options “And” and “Or”.

CONDITIONS  
↓

IF

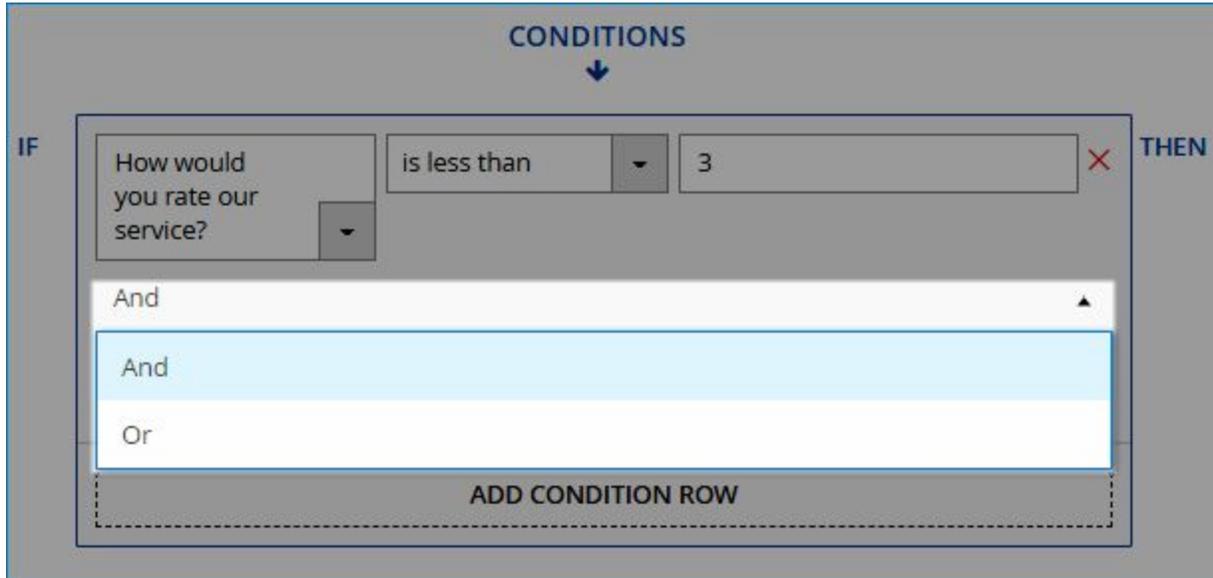
How would you rate our service? is less than 3 THEN

And

And

Or

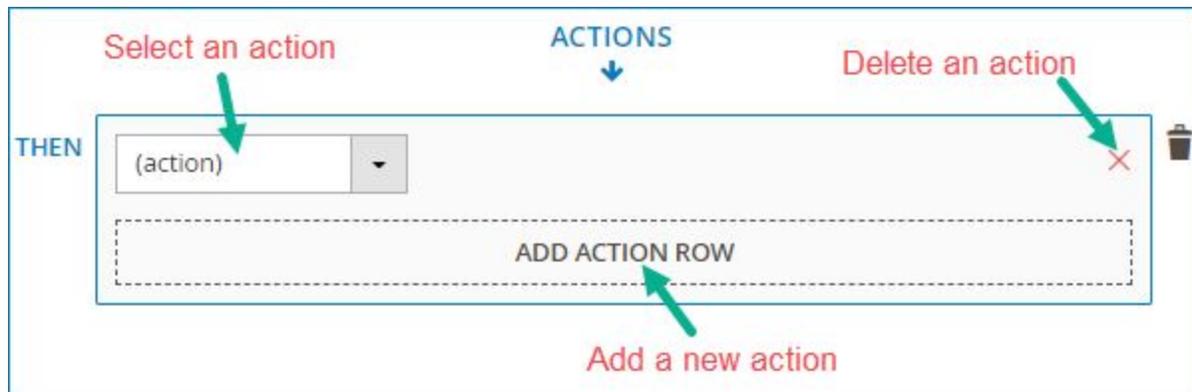
ADD CONDITION ROW



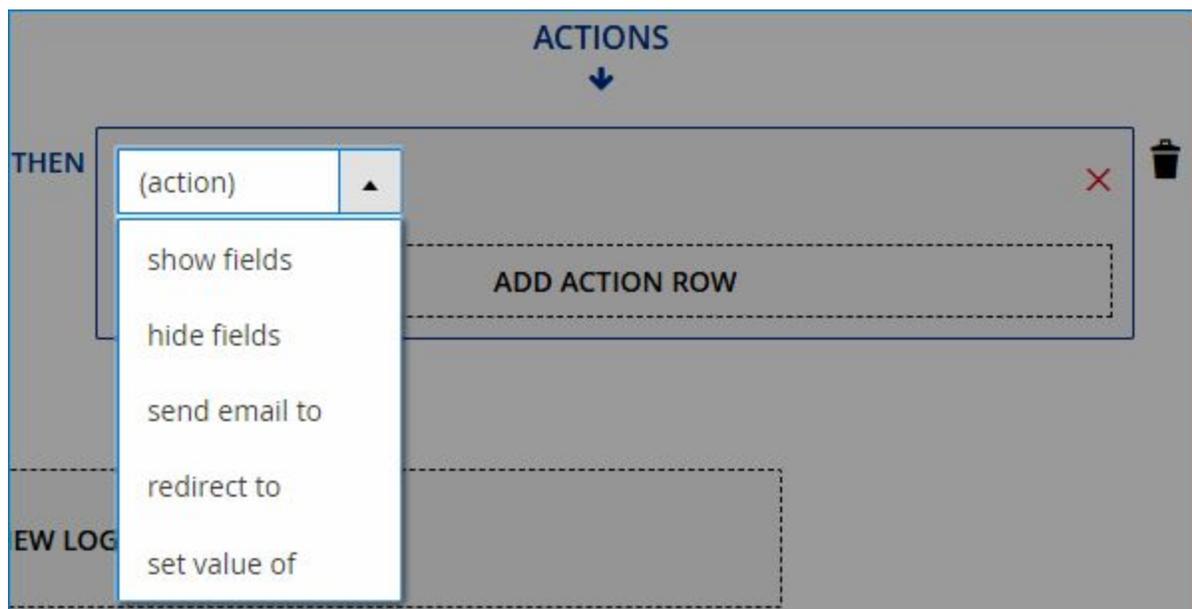
- + Select “And”: an action will happen only if all the conditions are fulfilled.
- + Select “Or”: an action will happen if any of the conditions are fulfilled.

## 2. Actions

- In this column, you will decide an action to happen under specific conditions you've set.
- Click **ADD ACTION ROW** to add a new action. You can add as many actions as you want. Or delete an action by clicking the red cross icon.

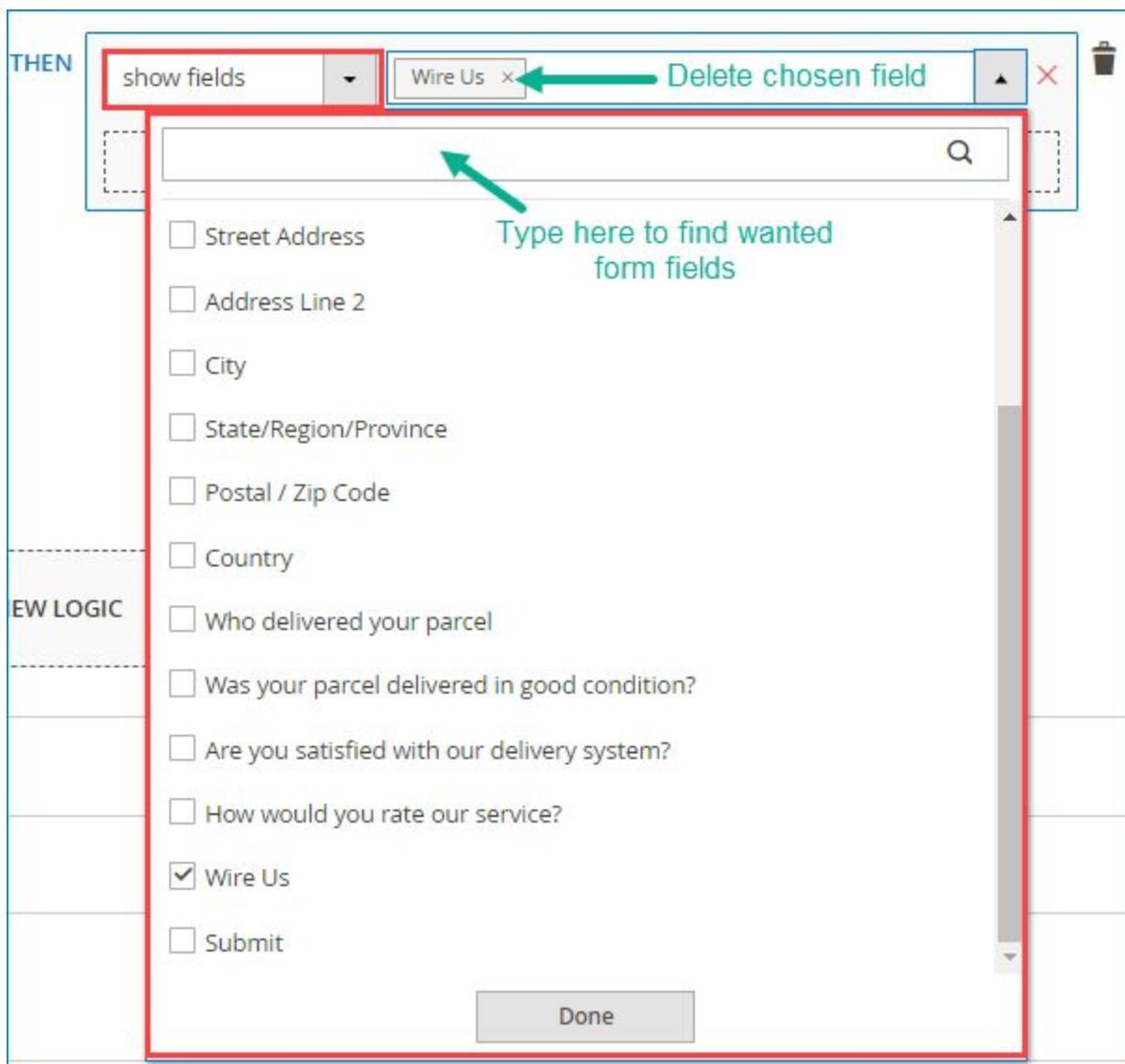


- Select the action you want to apply from the drop-down menu. There are 5 actions as follows:



## a) Show fields

- This action allows showing certain field(s) if the conditions are met.
- Select the fields you want to show by ticking the checkboxes next to the field names in a drop-down list. The form fields are listed by label and ordered based on their order in the form. You can select multiple fields at the same time. Or find your wanted fields quickly by typing their names in the search box (with spyglass icon) at the top of the drop-down menu. You can delete a form field by clicking the cross icon next to the field name.



THEN

show fields

Wire Us x Delete chosen field

Type here to find wanted form fields

Street Address

Address Line 2

City

State/Region/Province

Postal / Zip Code

Country

Who delivered your parcel

Was your parcel delivered in good condition?

Are you satisfied with our delivery system?

How would you rate our service?

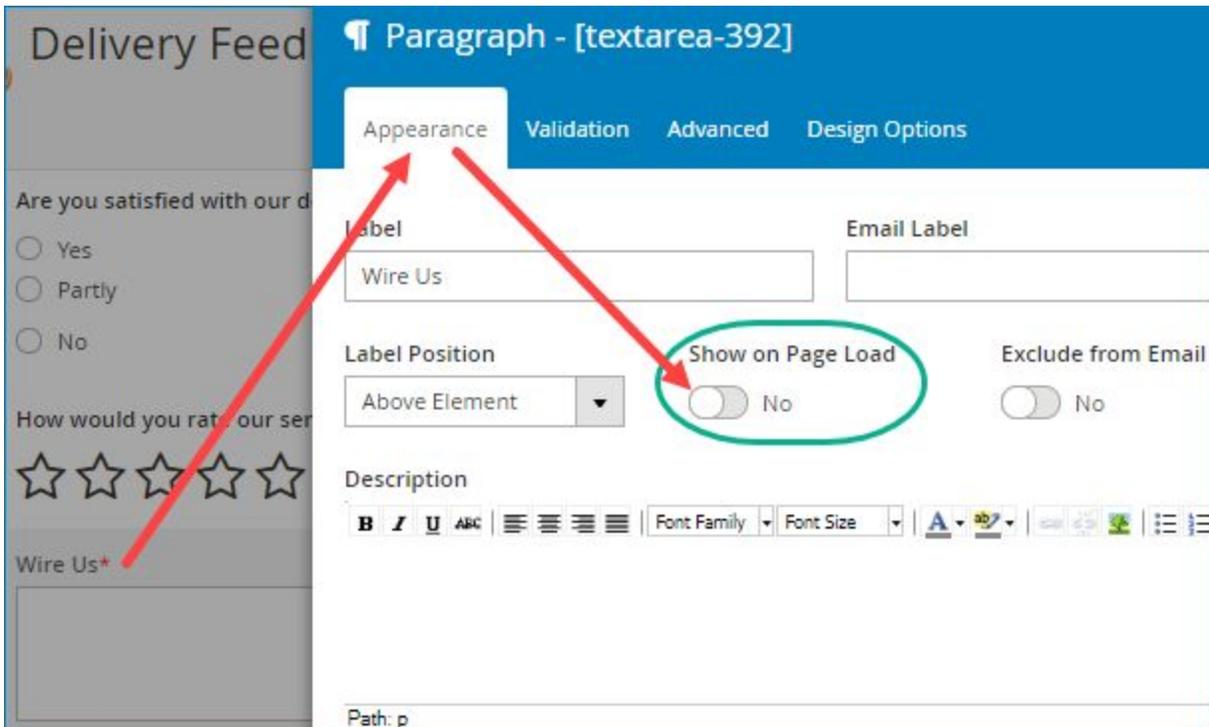
Wire Us

Submit

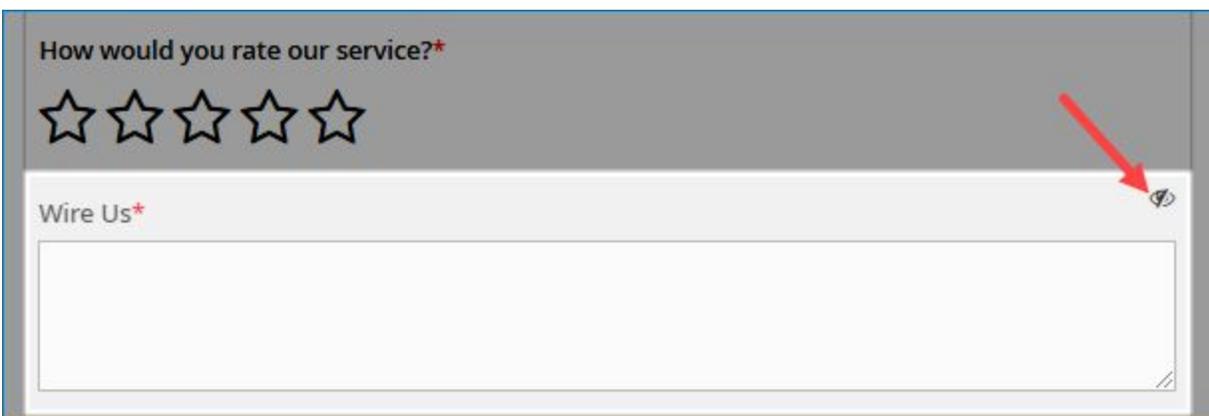
EW LOGIC

Done

**Note:** For this action to happen, you first need to hide the fields you want to show from the frontend form. It means that customers can not see these fields on the frontend. To do that, open the **Form Builder** tab, click on your wanted field to open its settings (in the below image, we will hide “Wire Us” field). In the **Appearance** tab, you will see the toggle button “Show on Page Load”. Turn off the button to hide the field from the frontend form. Do the same with other fields you want to hide.

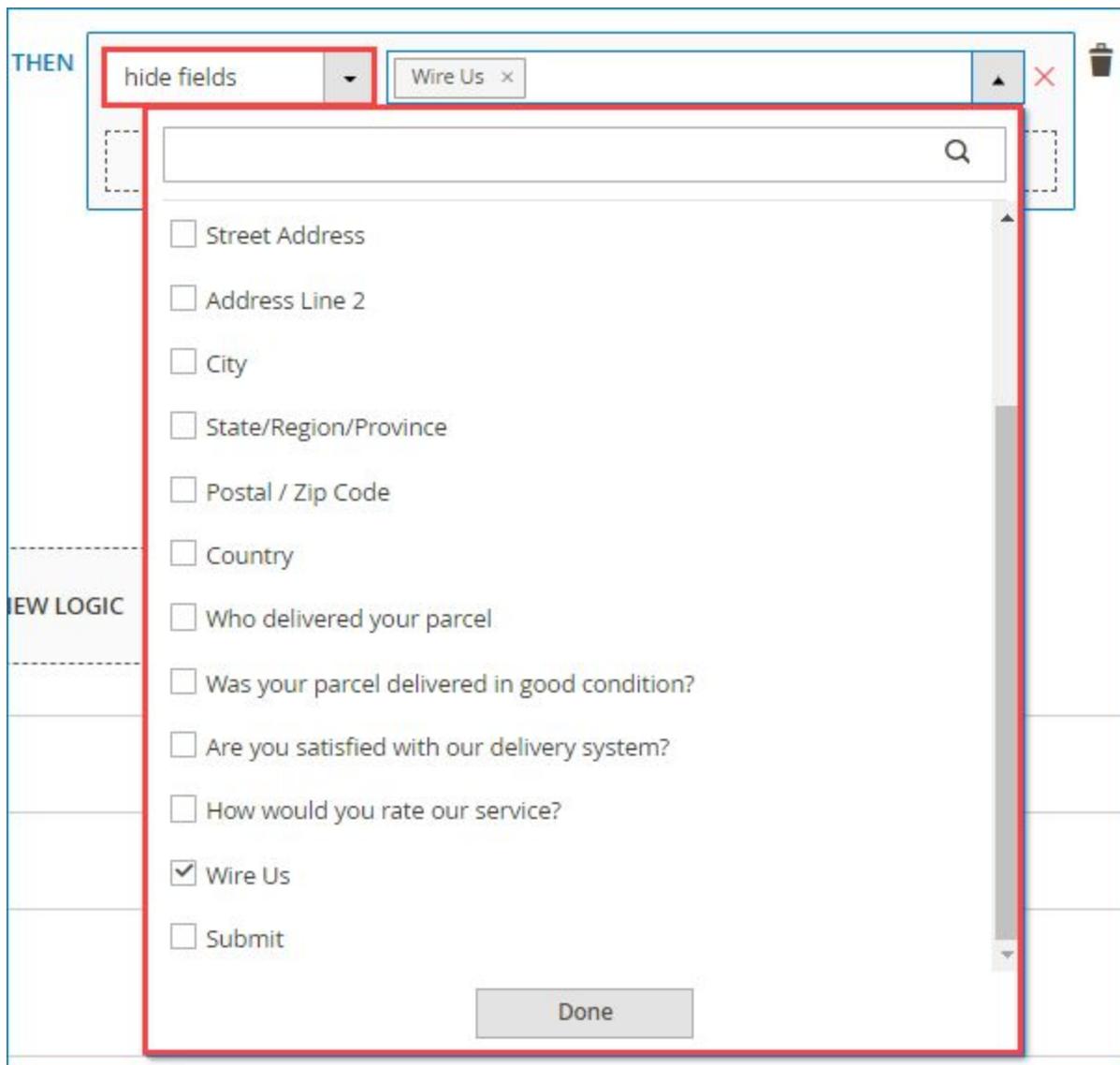


After saving, you will see the hidden icon on the top right corner of the form field:



## b) Hide fields

- Hide certain field(s) if the conditions are met.
- Select the fields you want to hide by ticking the checkboxes next to the field names in a drop-down list. The form fields are listed by label and ordered based on their order in the form. You can select multiple fields at the same time. Or find your wanted fields quickly by typing their names in the search box (with spyglass icon) at the top of the drop-down menu. Delete a form field by clicking the cross icon next to the field name.



THEN

hide fields

Wire Us x

Search

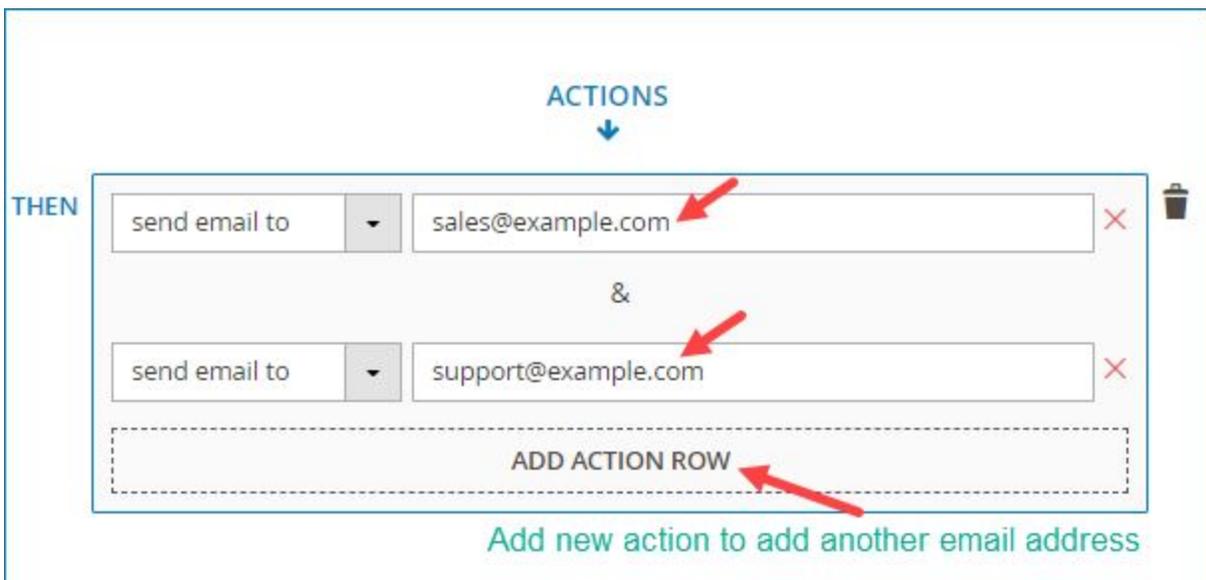
- Street Address
- Address Line 2
- City
- State/Region/Province
- Postal / Zip Code
- Country
- Who delivered your parcel
- Was your parcel delivered in good condition?
- Are you satisfied with our delivery system?
- How would you rate our service?
- Wire Us
- Submit

NEW LOGIC

Done

## c) Send email to

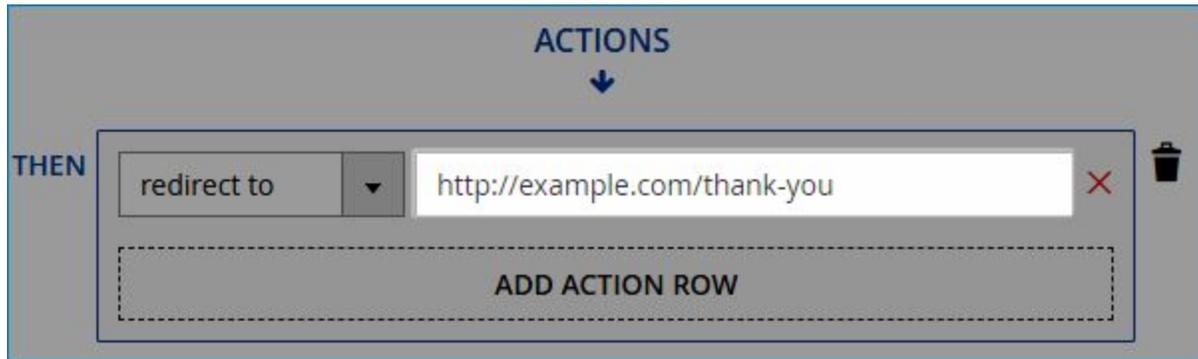
- If certain conditions are met, notification emails will be sent to specific email addresses in your company after a customer submits the form.
- If you select this action, a blank field will show up where you will enter your wanted email address. Note that you can enter only one email address in this field. If you want to add another email address, you need to add a new action.



The screenshot displays the 'ACTIONS' configuration interface. At the top, the word 'ACTIONS' is centered with a downward arrow. Below it, the word 'THEN' is positioned to the left of a list of actions. The first action is 'send email to' with a dropdown arrow, followed by a text input field containing 'sales@example.com'. A red arrow points to this field. To the right of the input field is a red 'X' icon for deletion, and a trash can icon is visible to the right of the entire list. The second action is 'send email to' with a dropdown arrow, followed by a text input field containing 'support@example.com'. A red arrow points to this field. Below the second action is a dashed box containing the text 'ADD ACTION ROW'. A red arrow points to this dashed box. At the bottom of the interface, the text 'Add new action to add another email address' is displayed in green.

## d) Redirect to

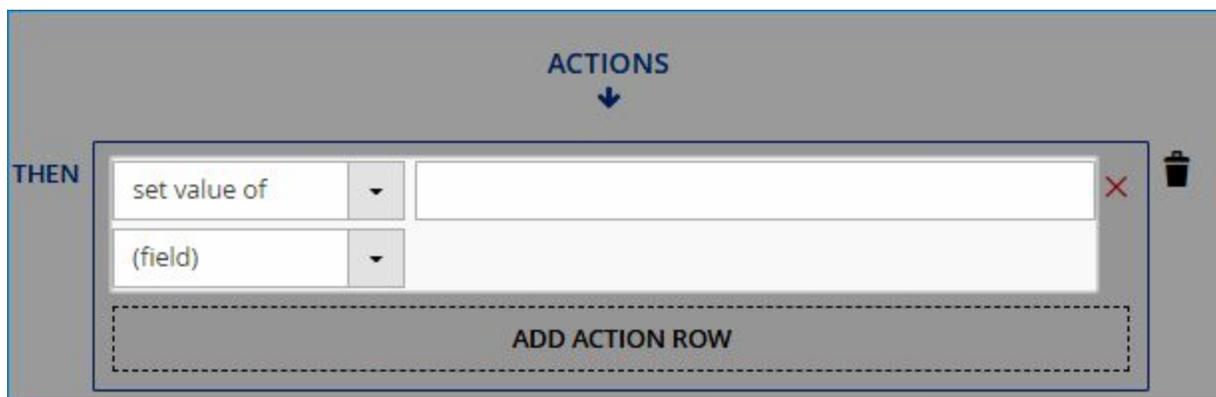
This allows you to redirect customers to any desired page after form submission. If you select this action, a blank field will show up where you will enter the page URL.



The screenshot shows a configuration window titled "ACTIONS" with a downward arrow. On the left, the word "THEN" is displayed. The main area contains a dropdown menu with "redirect to" selected. To the right of the dropdown is a text input field containing the URL "http://example.com/thank-you". A red "X" icon is on the right side of the input field, and a trash icon is on the far right. Below the input field is a dashed box containing the text "ADD ACTION ROW".

## d) Set value of

Based on what customers input in the form, specific fields will be automatically filled with the values you've already set in the backend. When selecting this option, you will see this:



The screenshot shows a configuration window titled "ACTIONS" with a downward arrow. On the left, the word "THEN" is displayed. The main area contains a dropdown menu with "set value of" selected. To the right of the dropdown is a text input field. Below the input field is another dropdown menu with "(field)" selected. A red "X" icon is on the right side of the input field, and a trash icon is on the far right. Below the input field is a dashed box containing the text "ADD ACTION ROW".

- + Select the field you want to be automatically filled out in a drop-down menu containing all the form fields. The form fields are listed by label and ordered based on their order in the form. You can find your wanted fields quickly by typing their names in the search box (with spyglass icon) at the top of the drop-down menu.

ACTIONS

THEN

set value of

(field)

Find wanted field by typing its name here

- Name
- Email
- Street Address
- Address Line 2
- City
- State/Region/Province
- Postal / Zip Code
- Country
- Who delivered your parcel
- Was your parcel delivered in good condition?
- Are you satisfied with our delivery system?
- How would you rate our service?

- + Enter a value for the chosen field in the blank field (the field in the red rectangle in the below image):

THEN

set value of

Enter field value here

(field)

ADD ACTION ROW

## IV) Example

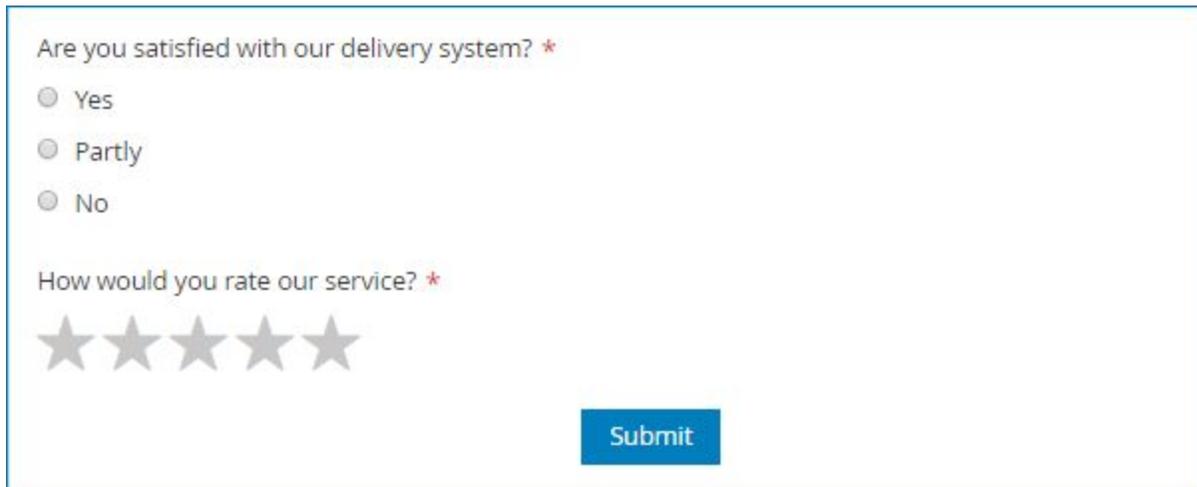
### 1. Show fields

- We will take a delivery feedback form as an example for this action (This is one of our form templates, so you can follow this [link](#) to have a more intuitive view). In this form, there is a field named “How would you rate our service?”, below are 5 stars for customers to rate. The conditional logic we want to use here is that if customers select fewer than 3 stars, the “Wire Us” field will be displayed to ask for further explanations.

- For the conditional logic to happen, follows these steps:

+ Step 1: Hide “Wire Us” field from the form on frontend

In order for the “Wire Us” field to show up when users select fewer than 3 stars, first you need to make sure that the field is hidden from the frontend form. It means that users cannot see the field when they open the form to fill out, like this:



Are you satisfied with our delivery system? \*

Yes

Partly

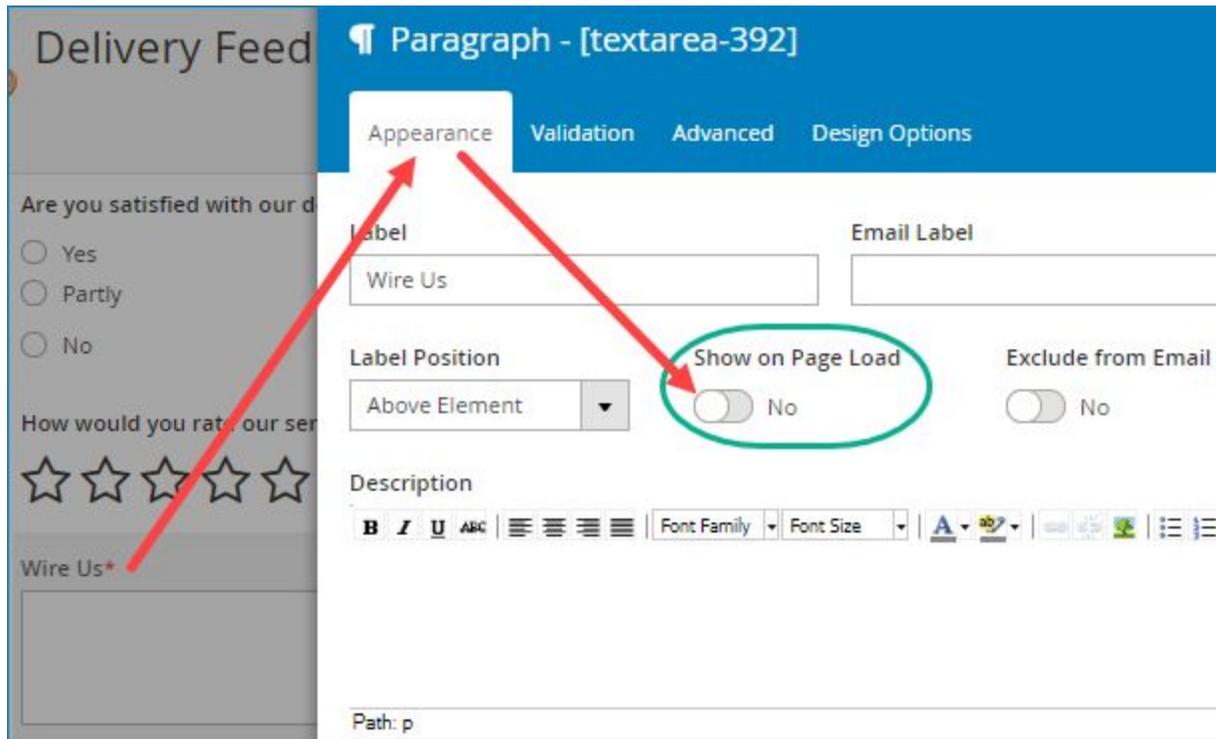
No

How would you rate our service? \*

★ ★ ★ ★ ★

Submit

- To do that, open the **Form Builder** tab. Click on the “Wire Us” field to open its settings. In the **Appearance** tab, you will see the toggle button “Show on Page Load”. Turn off the button to hide the field from the frontend form.

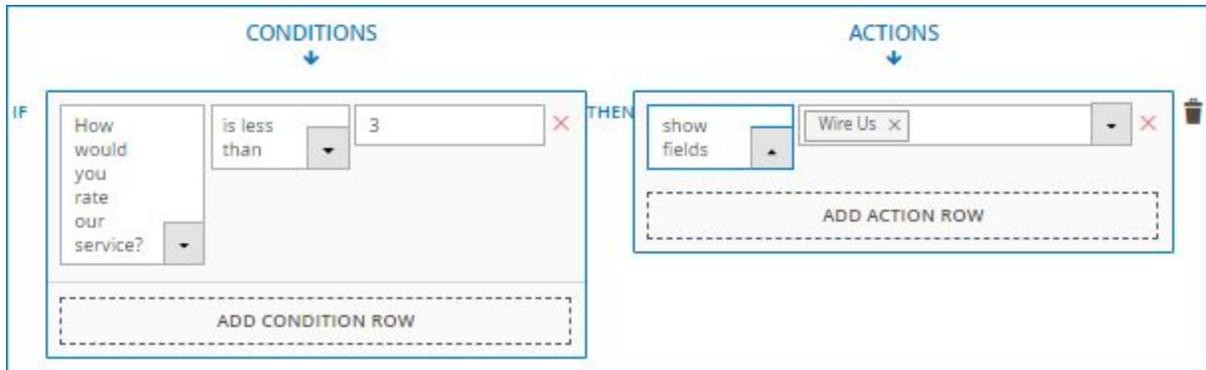


After saving, you will see the hidden icon on the top right corner of the field:



+ Step 2: Configure the conditional logic

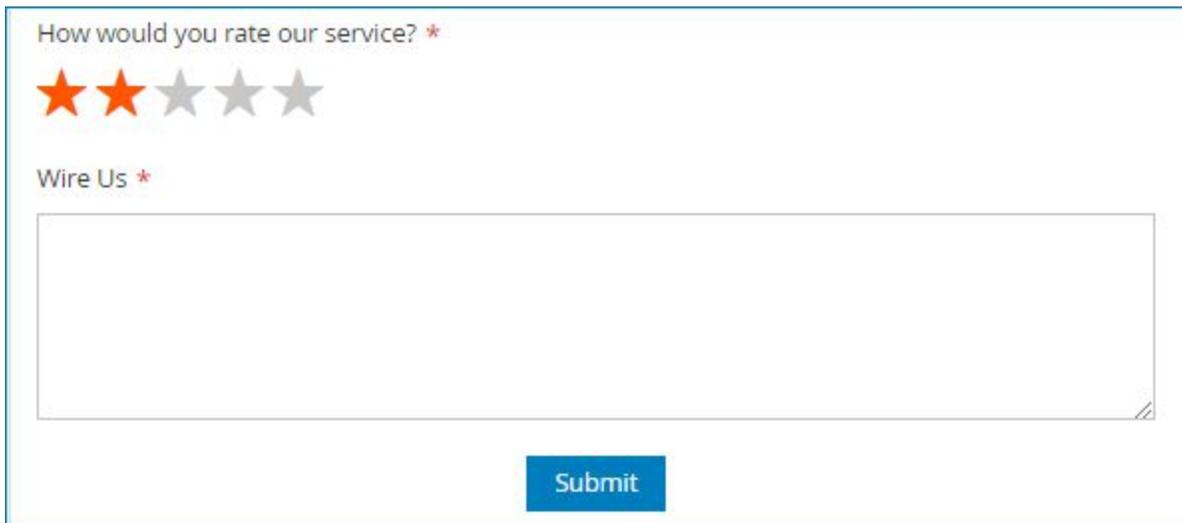
Go to **Plugins > Conditional Form Fields**. Set the conditional logic like this:



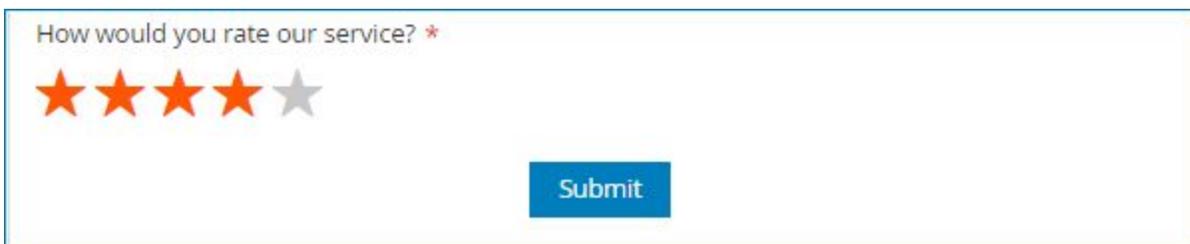
Remember to click **Save** button on the top right corner of the screen after finishing.

- Now, you've successfully set a conditional logic. Let's have a look at the frontend.

+ If customers select 1 or 2 stars, the "Wire Us" field will appear like this:



+ If customers rate 3 or more than 3 stars, the "Wire Us" field will not show up:



## 2. Hide fields

- We'll also take the delivery feedback form as an example. But the conditional logic here is that if customers select more than 2 stars, the field "Wire Us" will be hidden.

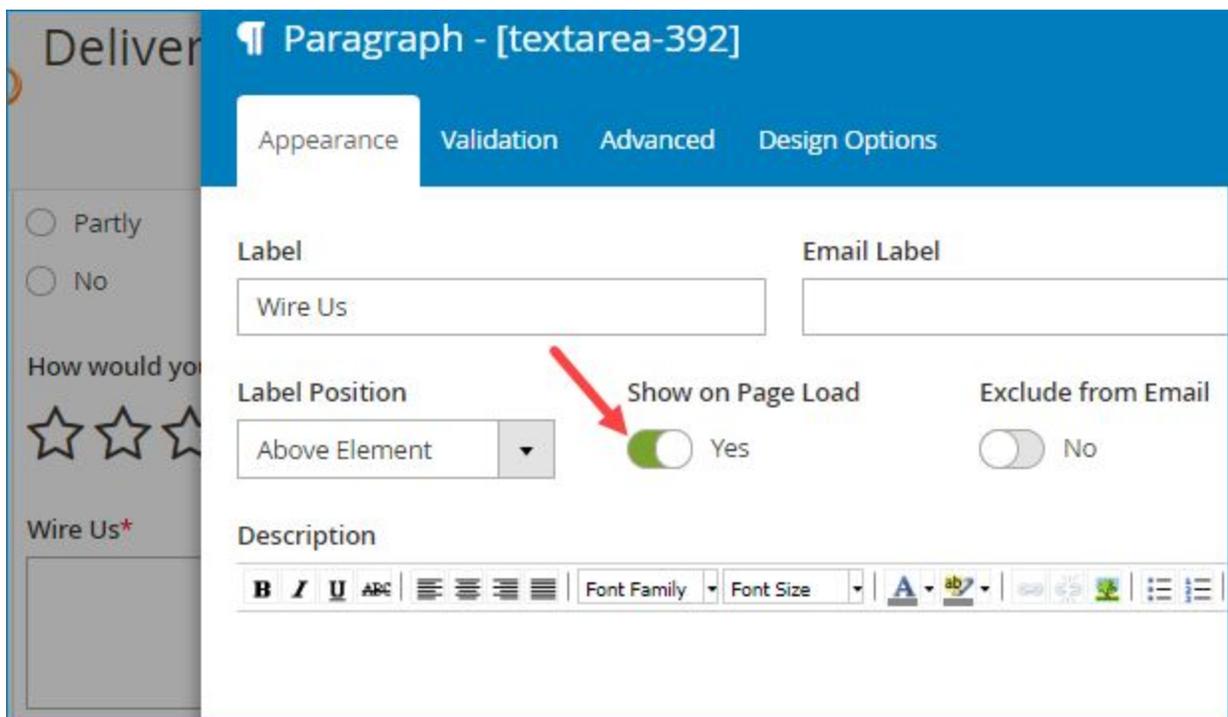
- In this case, you don't need to hide the field from the frontend form. Customers can still see it when opening the form to fill out, like this:



The screenshot shows a feedback form with the following elements:

- Label: "How would you rate our service? \*
- Rating: Five stars, all of which are currently greyed out.
- Label: "Wire Us \*
- Input: A large empty text area for providing feedback.

- So make sure the toggle button "Show on Page Load" is turned on like this:

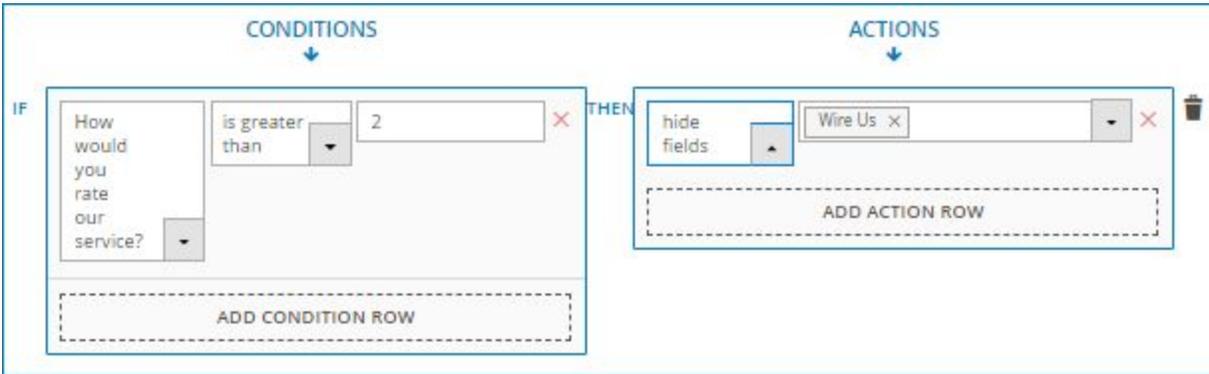


The screenshot shows the Magento admin interface for editing a form field. The field is titled "Paragraph - [textarea-392]". The "Appearance" tab is selected, showing the following configuration:

- Label: "Wire Us"
- Email Label: (empty)
- Label Position: "Above Element" (dropdown menu)
- Show on Page Load:  Yes (indicated by a red arrow)
- Exclude from Email:  No
- Description: (empty)

Below the configuration is a rich text editor toolbar with options for bold, italic, underline, text color, background color, font family, font size, and other formatting tools.

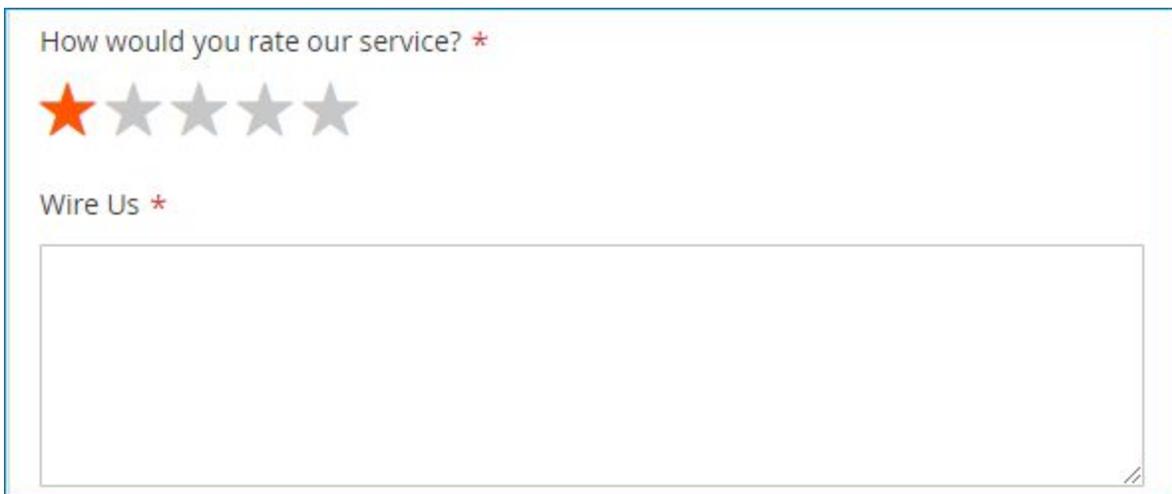
- After that, go to **Plugins > Conditional Form Fields**. Set the conditional logic like this:



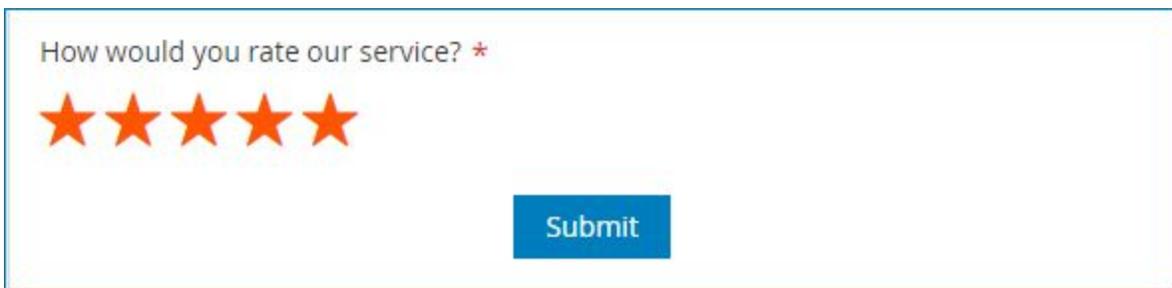
Remember to click **Save button** on the upper right corner of the screen after finishing.

- Now let's look at the frontend:

+ If customers select 1 of 2 stars, the "Wire Us" field will not disappear from the form:



+ If customers select more than 2 stars, the field will be hidden:



## 3. Send email to

Let's look at the form below (click [here](#) to have a clearer view)

### Contact Us

Fields with \* are required.

What would you like to enquire about? \*

- Sales and Leasing
- Service and Maintenance
- Equipment Rental Solutions
- Integrated Systems
- Technical Support
- General Enquiry

First Name \*

Last Name \*

Email Address \*

Company \*

Phone \*

Postcode \*

State \*

Country \*

Add your message \*

100 of 100 Character(s) left

Are you a robot?

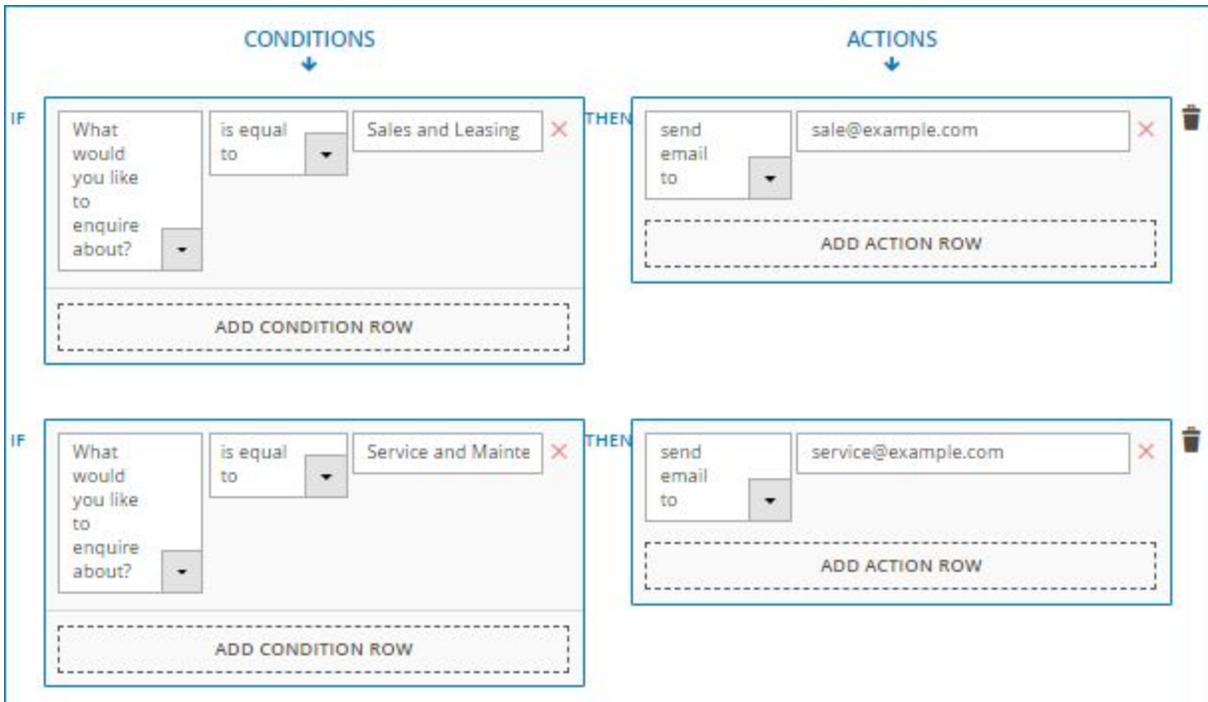
I'm not a robot 

reCAPTCHA  
Privacy - Terms

In submitting this information you acknowledge that you have read and agree with our Terms and Conditions and Privacy Policy.

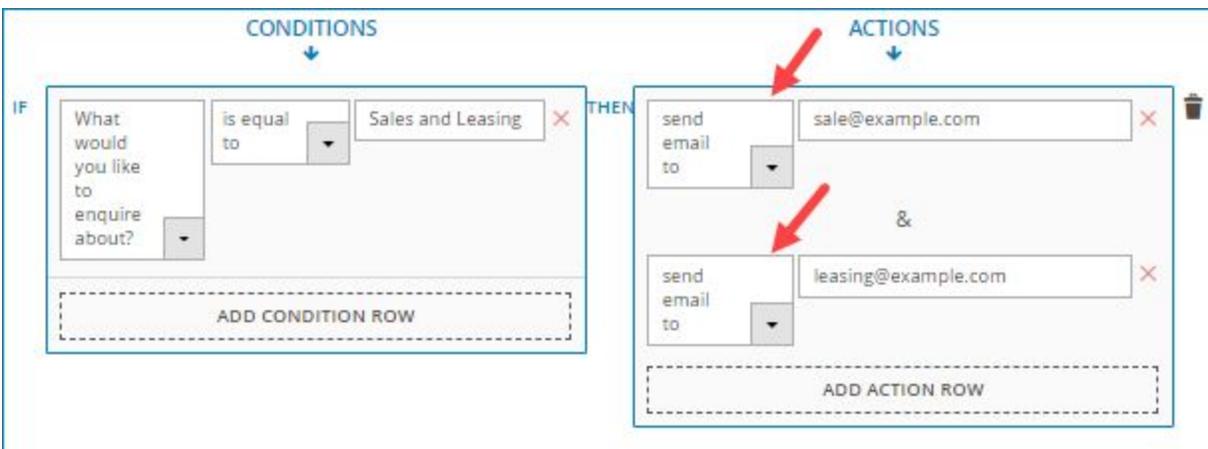
- In the field in the red rectangle, if customers select **Sales and Leasing**, we want to send an email to “sale@example.com”. If customers select **Service and Maintenance**, we want to notify “service@example.com”.

- So you need to add 2 logics like this (click [here](#) to see these logic in the backend):



The screenshot displays two conditional logic rules in a builder interface. Each rule is structured as 'IF [condition] THEN [action]'. The first rule's condition is 'What would you like to enquire about?' is equal to 'Sales and Leasing'. Its action is 'send email to' 'sale@example.com'. The second rule's condition is 'What would you like to enquire about?' is equal to 'Service and Maintenance'. Its action is 'send email to' 'service@example.com'. Both rules include 'ADD CONDITION ROW' and 'ADD ACTION ROW' buttons.

- In each logic, you can add only one email. If you want to add more emails, you need to add more actions, like this:



The screenshot shows a single conditional logic rule. The condition is 'What would you like to enquire about?' is equal to 'Sales and Leasing'. The action section contains two rows: 'send email to' 'sale@example.com' and 'send email to' 'leasing@example.com', with an ampersand (&) between them. Red arrows point to the email address fields in both action rows. The interface also includes 'ADD CONDITION ROW' and 'ADD ACTION ROW' buttons.

## 4. Redirect to

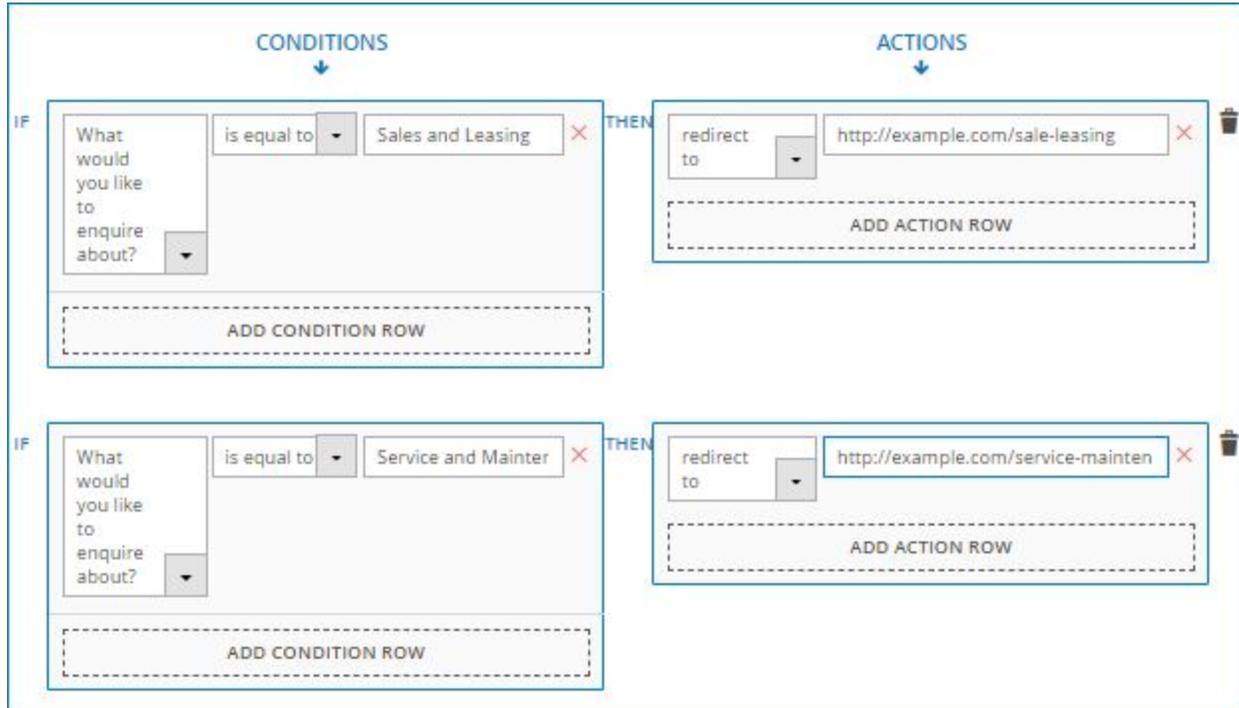
- Example:

In a signup form, there is a field named “Newsletter” with “Yes” and “No” radio buttons. If a customer selects “Yes” to receive newsletters from your website, he/she will be redirected to page <http://example.com/newsletter-subscription-thank-you> after submitting the form. If “No” is selected, the customer will land on page <http://example.com/thank-you> after form submission.

- The conditional logic will look like this:



**Note:** Let’s look at the following case. In a contact form, there is a field asking customers about what aspects they would like to enquire about. And customers can choose multiple aspects. In the backend we have conditional logics as follows:



Because customers can choose multiple aspects, so if they choose both “Sale and Leasing” and “Service and Maintenance”, what would they be redirected to after form submission? The answer is that they will navigate to the page in the first conditional logic. In this example, it is “<http://example.com/sale-leasing>”.

## 5. Set value of

- Example:

- + Your company is doing a promotion in which customers will get a 10% discount if they buy more than 10 T-shirts.
- + In an online product purchase form, if customers fill the “Type” field with “T-shirt” and the “Quantity” field with a number greater than 10, then the “Discount” field will be automatically filled with “10%”.

- The logic will look like this:

**CONDITIONS**

↓

**ACTIONS**

↓

IF

Type

▼

is equal to

▼

T-shirt

✕

And ▼

Quantity

▼

is greater than

▼

10

✕

ADD CONDITION ROW

THEN

set value of

▼

10%

✕

Discount

▼

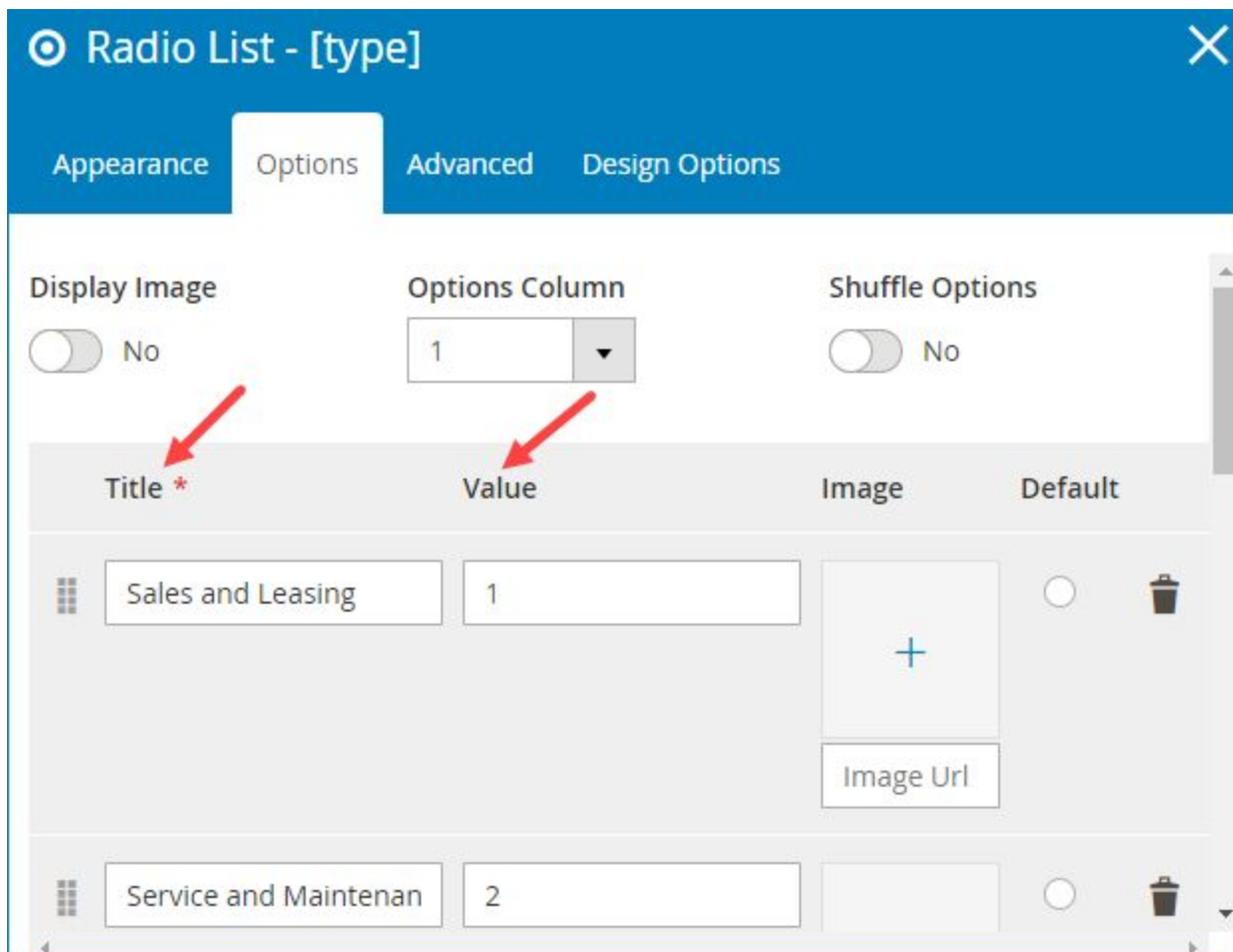
ADD ACTION ROW

## V) Conditional Logic with Special Fields

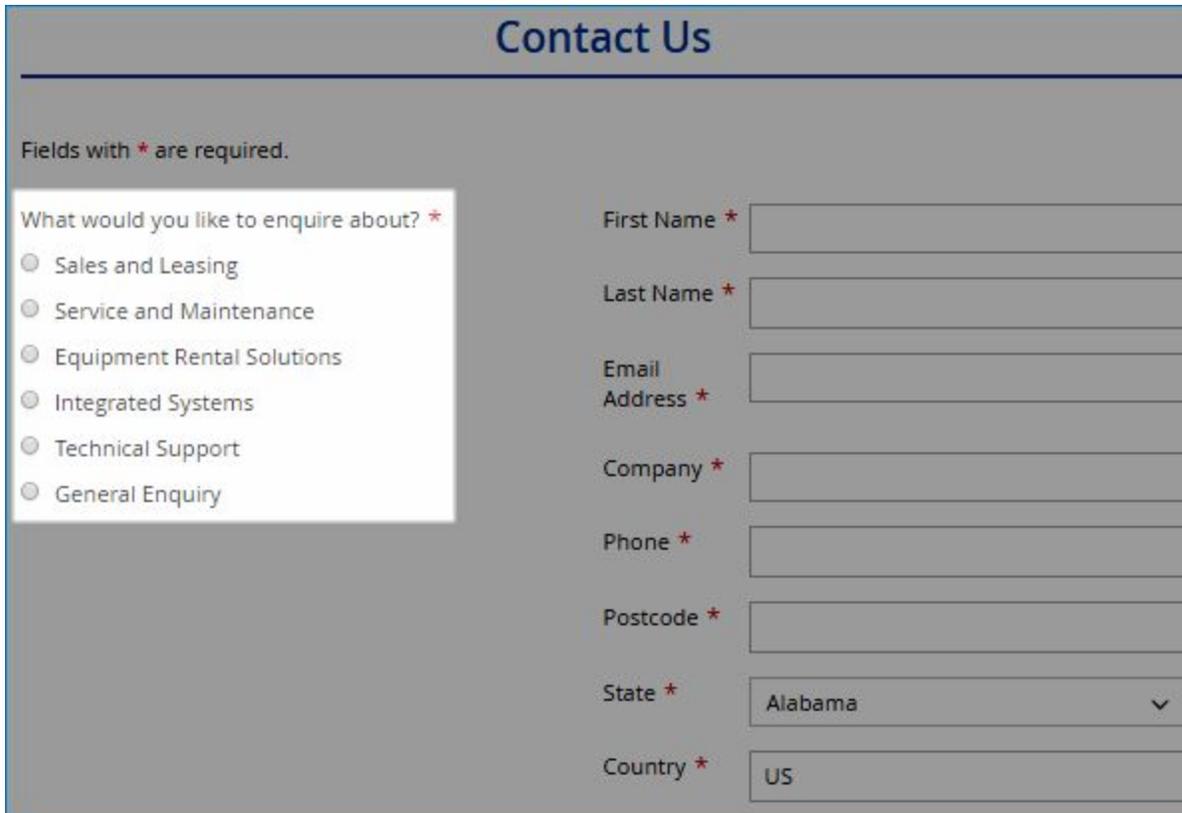
### 1. Multiple Choice fields

With multiple choice fields including Select, Multiple Select, Checkbox List and Radio List, you can set a value for each option and the value is separate from the title. Customers can only see the title on the frontend. When setting conditional logic for these fields, you would use the value instead of the title.

For example, here is the configuration of a radio list field labelled “What would you like to enquire about?” in the backend:



Each title has a value (in the above image, we set “1” for “Sale and Leasing” title, “2” for “Service and Maintenance” title). Frontend users can only see the title, like this:



**Contact Us**

Fields with \* are required.

What would you like to enquire about? \*

- Sales and Leasing
- Service and Maintenance
- Equipment Rental Solutions
- Integrated Systems
- Technical Support
- General Enquiry

First Name \*

Last Name \*

Email Address \*

Company \*

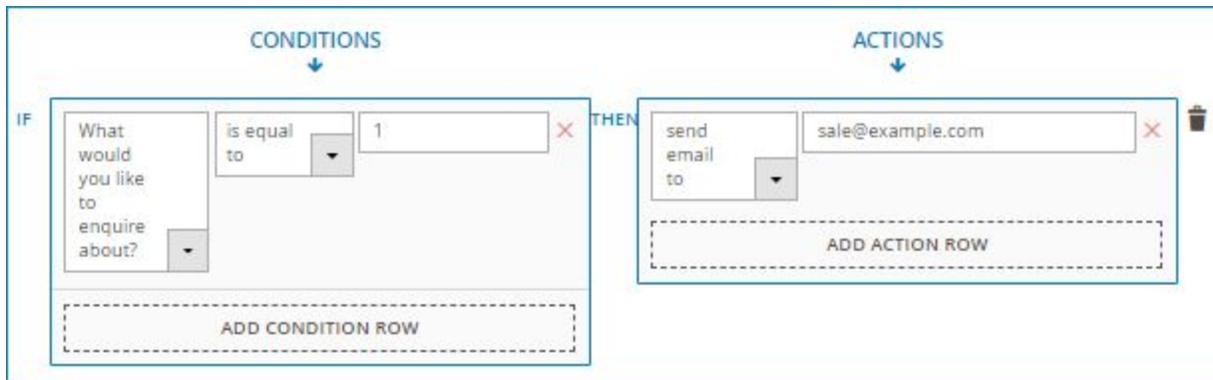
Phone \*

Postcode \*

State \*

Country \*

We want to send email to **sale@example.com** if customers select “Sale and Leasing”. The logic will look like this:



## 2. Subscribe field

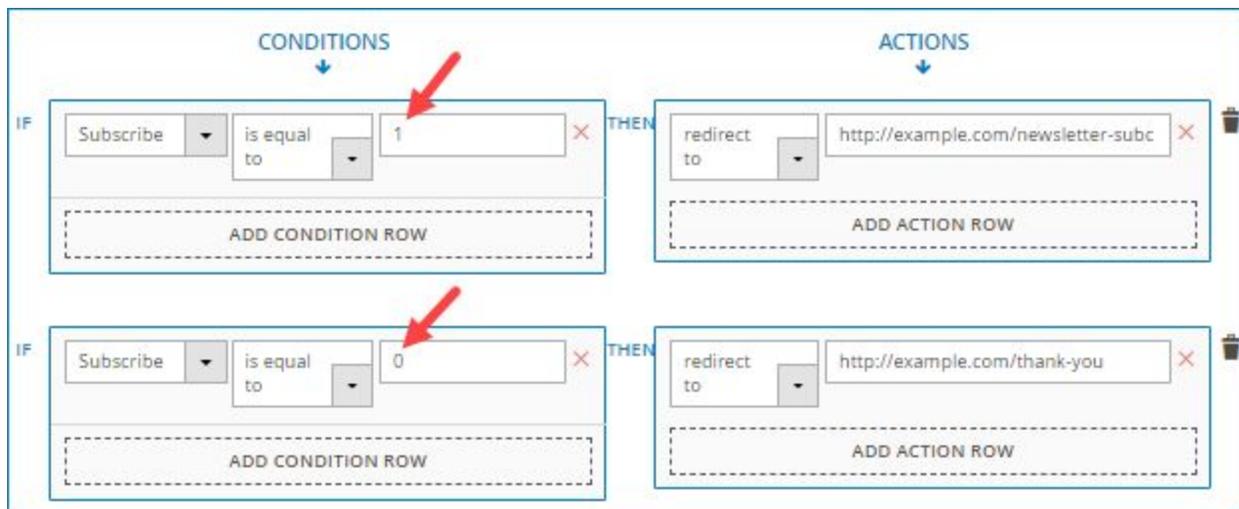
- “Subscribe” field is actually a single checkbox used for newsletter subscription. This is how it looks on the frontend:



- When setting up conditional logic for this kind of field, you would use “0” and “1” (“1” for ticked checkbox and “0” for non-ticked checkbox) or “Yes” and “No” (“Yes” for ticked checkbox and “No” for non-ticked checkbox).

- Here are examples of conditional logic for this kind of field:

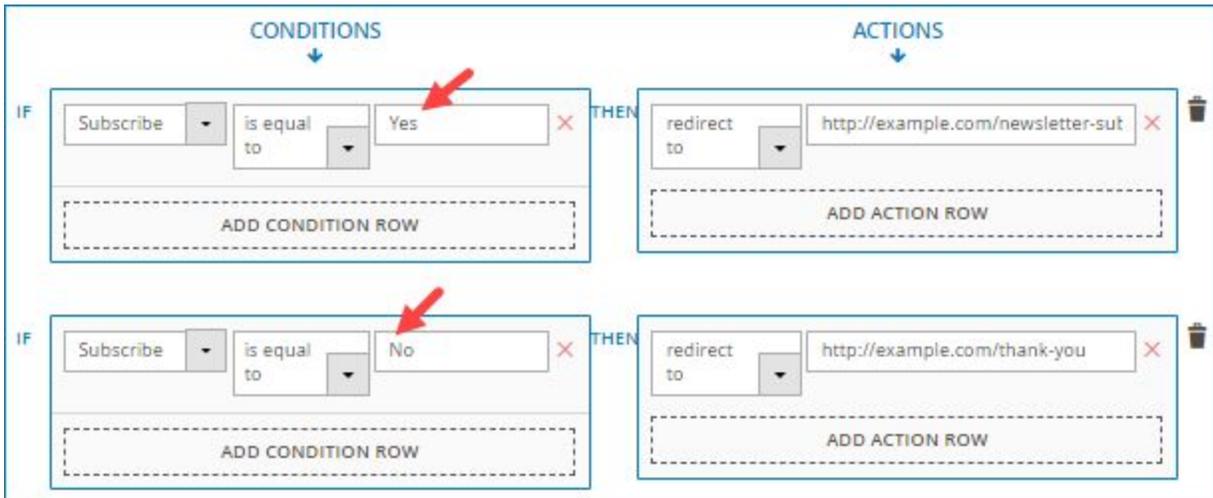
+ Use “0” and “1”:



In the above image, the first logic is: “IF **Subscribe** is equal to **1** THEN redirect to **http://example.com/newsletter-subscription-thank-you**”. It means that if customers tick the “Subscribe” checkbox, they will be redirected to page “http://example.com/newsletter-subscription-thank-you” after form submission.

The second logic is “IF **Subscribe** is equal to **0** THEN redirect to **http://example.com/thank-you**”. It means that if customers do not tick the “Subscribe” checkbox, they will be redirected to page “http://example.com/thank-you” after form submission.

- + Use “Yes” and “No”: it is similar to using “0” and “1” value. The logic will look like this:



The image shows a configuration interface for smart conditional logic, divided into two main sections: "CONDITIONS" and "ACTIONS".

**CONDITIONS:**

- Row 1: "IF" condition. The field "Subscribe" is selected, followed by "is equal to". The value "Yes" is entered in the text box. A red arrow points to the "Yes" text box.
- Row 2: "IF" condition. The field "Subscribe" is selected, followed by "is equal to". The value "No" is entered in the text box. A red arrow points to the "No" text box.

**ACTIONS:**

- Row 1: "THEN" action. The action "redirect to" is selected, and the URL "http://example.com/newsletter-sut" is entered in the text box.
- Row 2: "THEN" action. The action "redirect to" is selected, and the URL "http://example.com/thank-you" is entered in the text box.

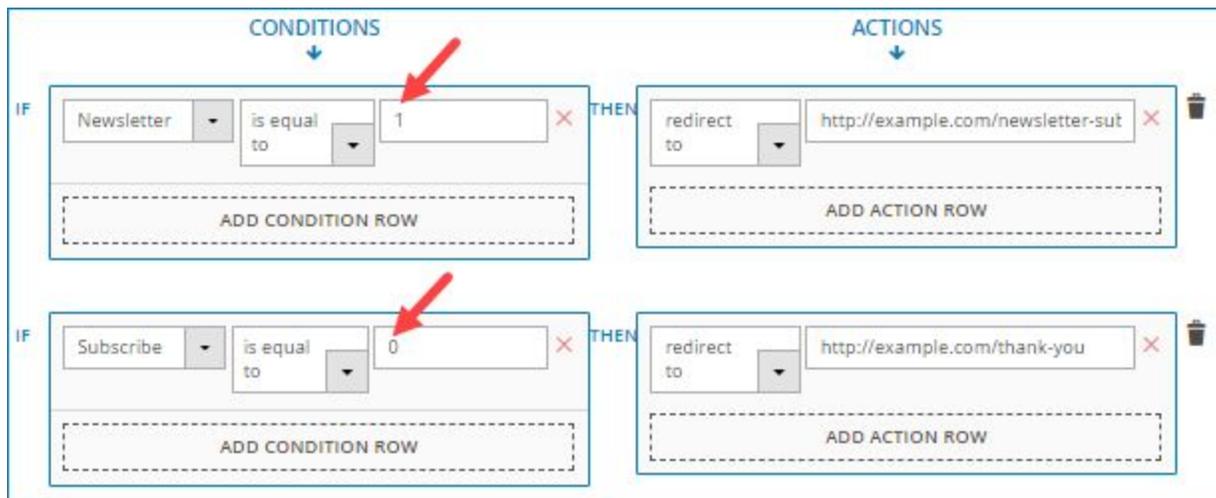
Each row includes an "ADD CONDITION ROW" or "ADD ACTION ROW" button and a trash icon for deletion.

## 3. Toggle field

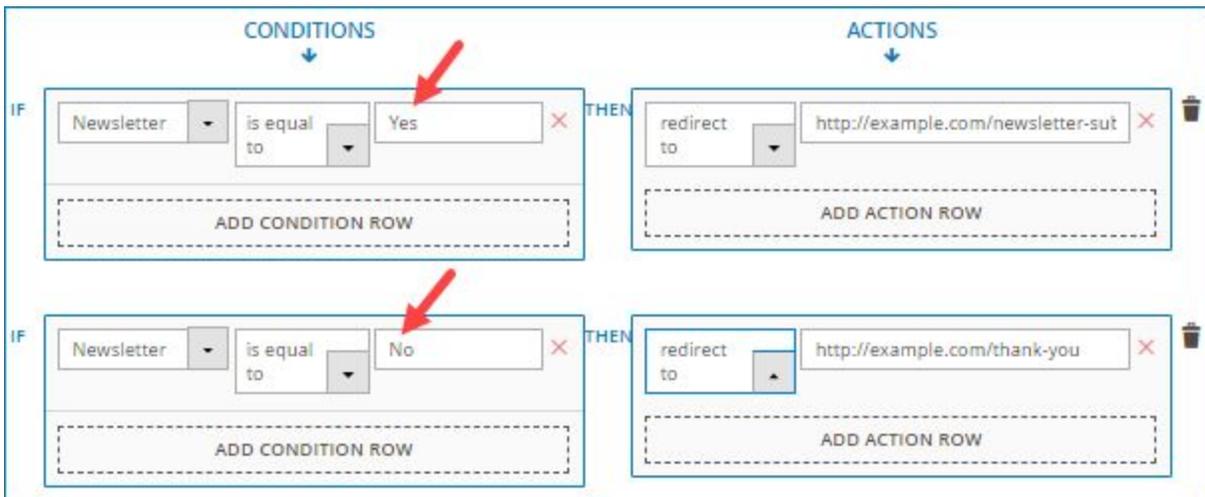
- This is how the field looks on frontend:



- Similar to "Subscribe" field, when using conditional logic for this kind of field, you would use either "0" and "1" ("1" for turned-on button and "0" for turned-off button) or "Yes" and "No" ("Yes" for turned-on button and "No" for turned-off button). The logic will be:



Or...



## 4. Single Checkbox field

- This field will look like this on frontend:

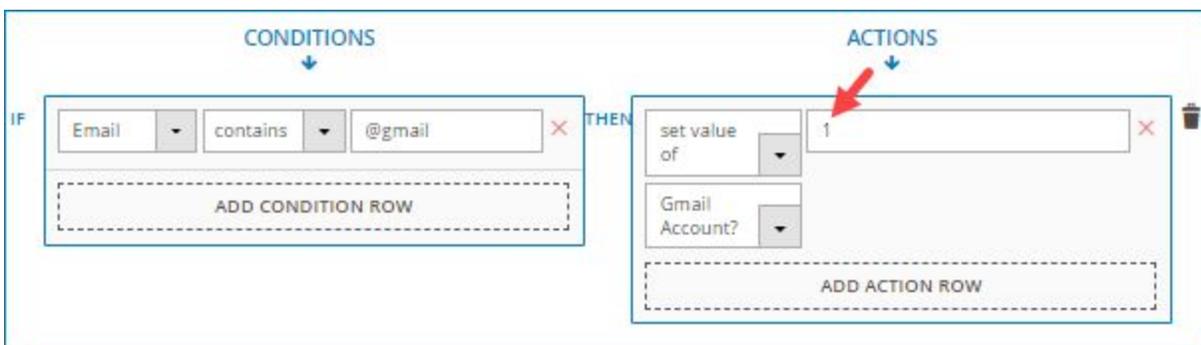


Email

Gmail Account?

- To make this kind of field conditional, you would use either “0” and “1” (“1” for ticked checkbox and “0” for non-ticked checkbox) or “Yes” and “No” (“Yes” for ticked checkbox and “No” for non-ticked checkbox).

- Let’s look at the logic using “0” and “1” value:



**CONDITIONS**

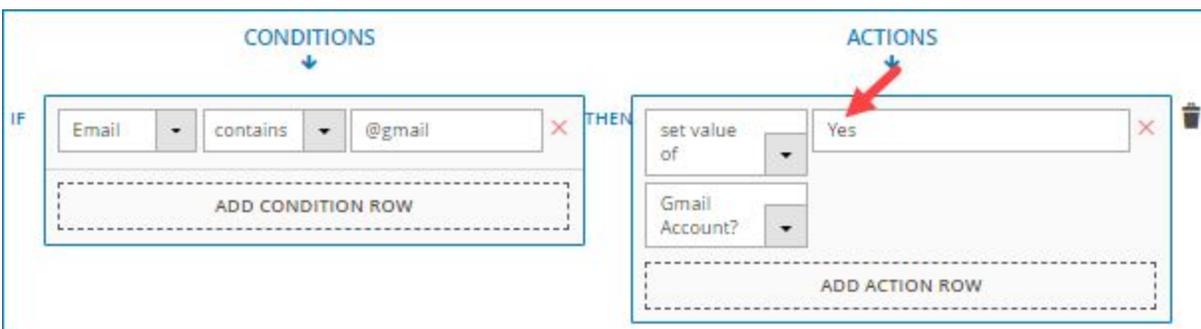
IF  contains

**ACTIONS**

THEN set value of  Gmail Account?

The logic here is: if the email that customers fill in the “Email” field contains “@gmail”, then we will automatically tick the “Gmail Account?” field.

- Or you can set this logic using “Yes” and “No”:



**CONDITIONS**

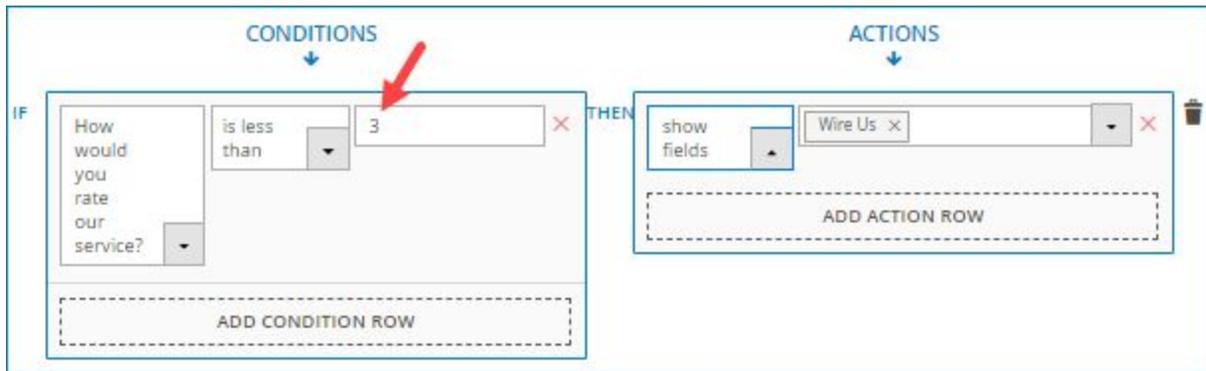
IF  contains

**ACTIONS**

THEN set value of  Gmail Account?

## 5. Star Ratings field

- The value you use in conditional logic for this kind of field will be a number, like this:



The screenshot displays the 'Smart Conditional Logic' configuration interface, divided into two main sections: 'CONDITIONS' and 'ACTIONS'.

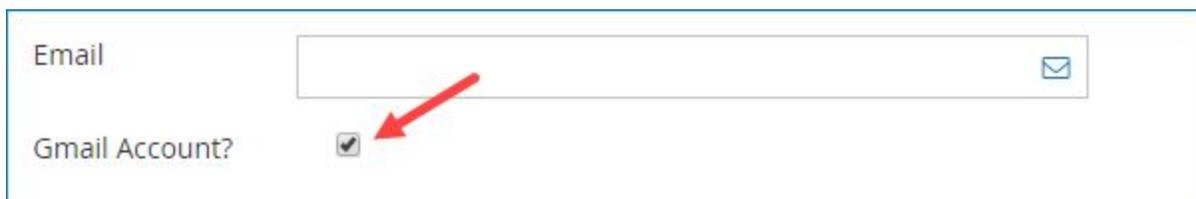
**CONDITIONS:** This section is labeled 'IF' on the left. It contains a dropdown menu with the text 'How would you rate our service?'. To its right is a comparison operator dropdown set to 'is less than'. Further right is a text input field containing the number '3', which is highlighted by a red arrow. A red 'X' icon is located to the right of the input field. Below this row is a dashed box labeled 'ADD CONDITION ROW'.

**ACTIONS:** This section is labeled 'THEN' on the left. It contains a dropdown menu set to 'show fields'. To its right is a dropdown menu set to 'Wire Us', with a red 'X' icon to its right and a trash can icon to the far right. Below this row is a dashed box labeled 'ADD ACTION ROW'.

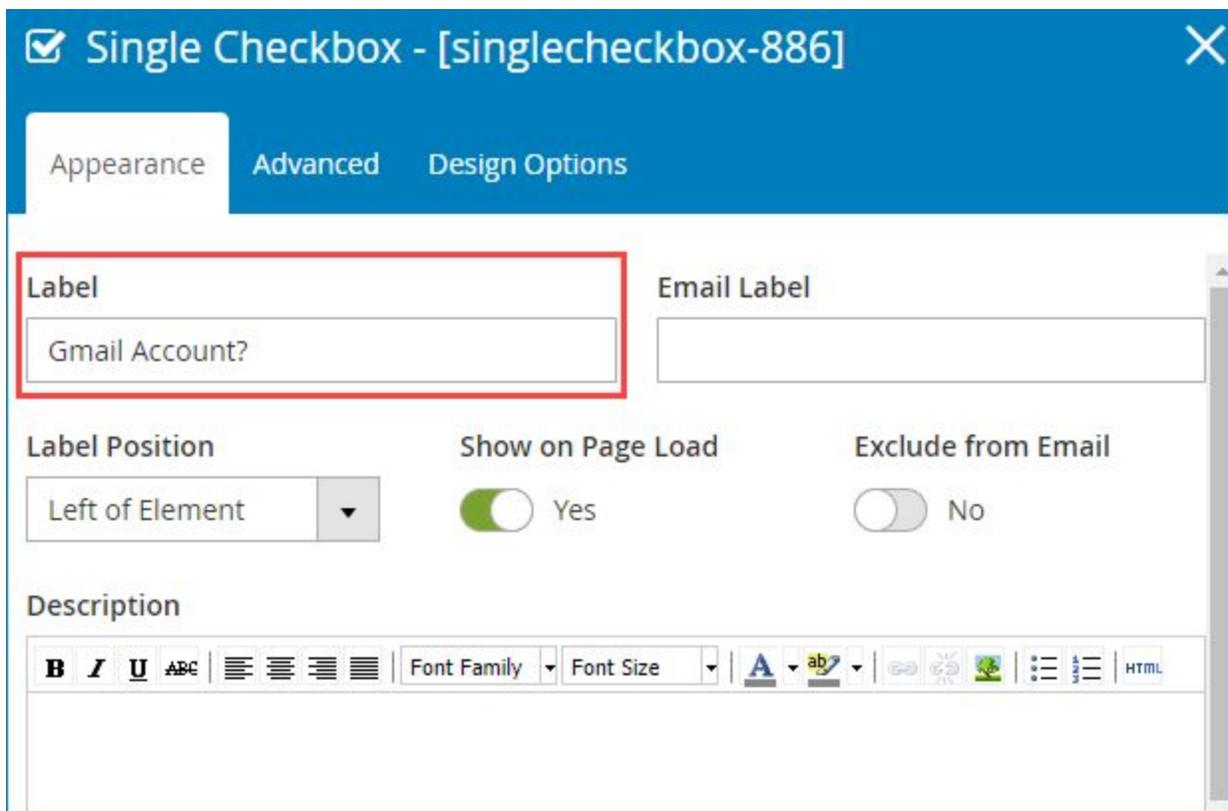
## 6. Fields with no label

As we mentioned above, when you want to choose a field to make conditional, you will select from a drop-down menu. The fields are listed in the menu by label that you decide in their settings. But for the fields that have no label, what is displayed in the drop-down menu is their default names.

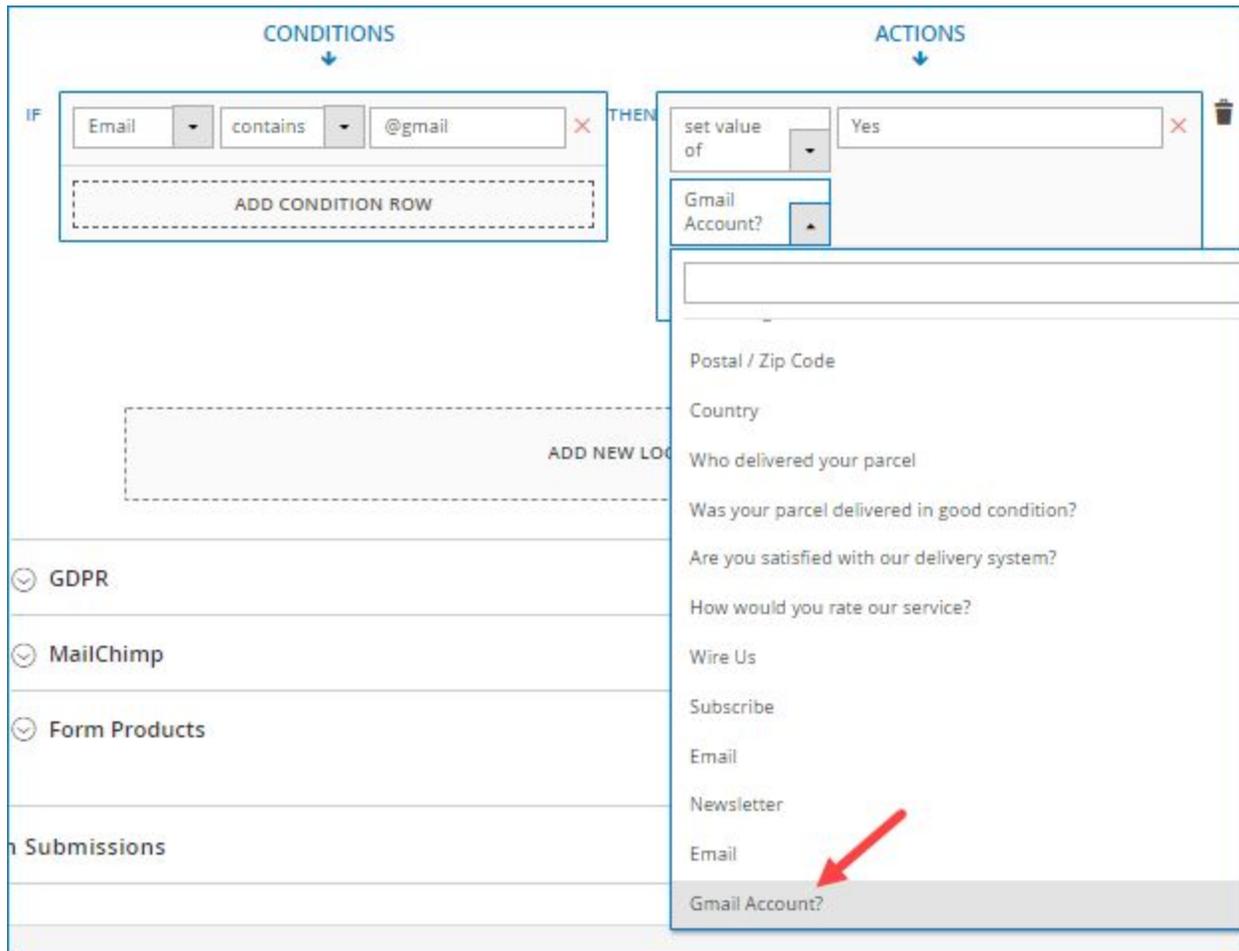
Let's look at this example:



In the above image, "Gmail Account?" is a single checkbox field. The settings of this field in the backend look like this:



As you can see in the image, we enter the **Label** field with "Gmail Account?". When you set a logic for this field, the "Gmail Account?" label will appear in the drop-down menu like this:



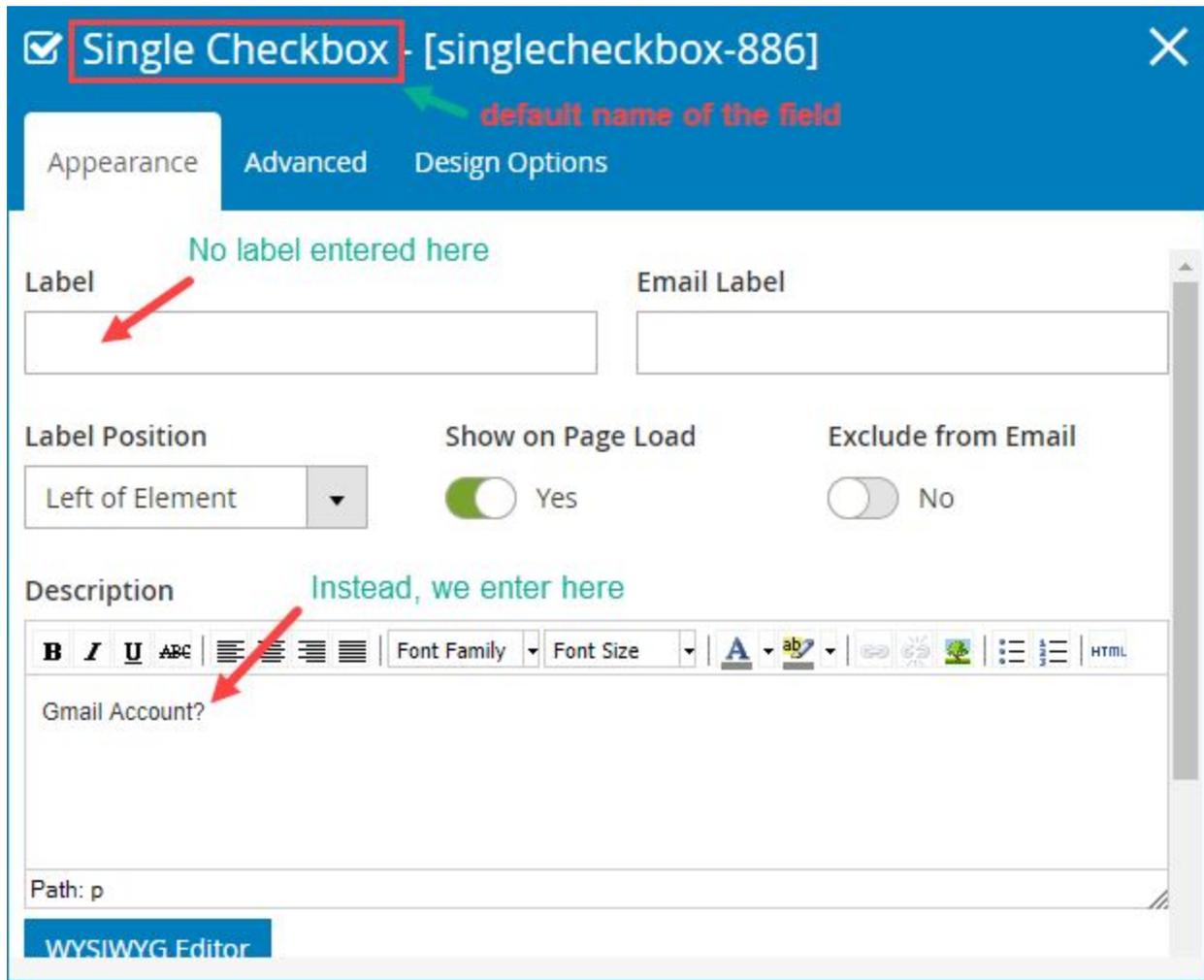
The screenshot displays the configuration interface for Smart Conditional Logic, divided into two main sections: **CONDITIONS** and **ACTIONS**.

**CONDITIONS:** A rule is configured with the following structure: **IF** **Email** **contains** **@gmail**. Below this, there is a dashed box labeled "ADD CONDITION ROW" and another dashed box labeled "ADD NEW LOGIC".

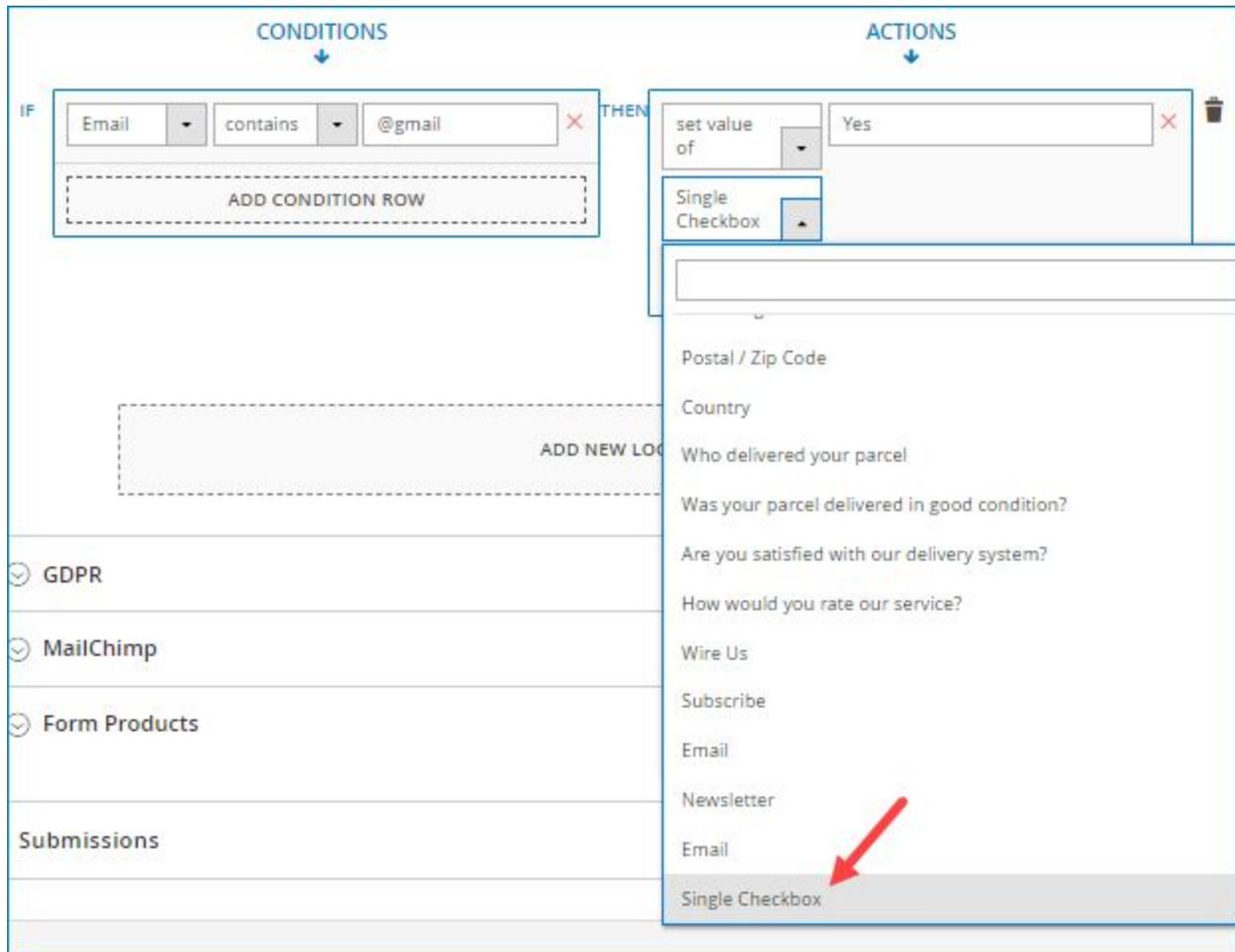
**ACTIONS:** A rule is configured with the following structure: **set value of** **Yes**. Below this, there is a dropdown menu for selecting a field. The dropdown list includes the following options: Postal / Zip Code, Country, Who delivered your parcel, Was your parcel delivered in good condition?, Are you satisfied with our delivery system?, How would you rate our service?, Wire Us, Subscribe, Email, Newsletter, Email, and **Gmail Account?**. A red arrow points to the "Gmail Account?" option, which is highlighted in grey.

At the bottom of the interface, there are several expandable sections: **GDPR**, **MailChimp**, **Form Products**, and **Submissions**.

However, if we do not enter the label for this field, like this...



...what will be displayed in the drop-down menu? It is the default name of this field that you can see in the red rectangle in the above image (that is “Single Checkbox”). The logic will be like this:



The screenshot displays the configuration interface for Smart Conditional Logic, divided into two main sections: **CONDITIONS** and **ACTIONS**.

**CONDITIONS:** This section is labeled "IF" and contains a single condition: "Email" (selected from a dropdown) "contains" (selected from a dropdown) "@gmail". Below this condition is a dashed box labeled "ADD CONDITION ROW".

**ACTIONS:** This section is labeled "THEN" and contains an action: "set value of" (selected from a dropdown) "Yes" (entered in a text field). Below this action is a dropdown menu labeled "Single Checkbox" which is currently open, showing a list of available actions. A red arrow points to the "Single Checkbox" option at the bottom of this list.

Below the configuration area, there is a sidebar with several expandable sections: "GDPR", "MailChimp", "Form Products", and "Submissions".

## VI) Support

If you have any questions or need any support, feel free to contact us via following ways.

We will get back to you within 24 hours since you submit your support request.

- Fill out [Contact Us](#) form and submit to us.
- Email us at [support@magezon.com](mailto:support@magezon.com).
- Submit a [ticket](#).
- Contact us through [Skype](#): support@magezon.com.
- Contact us on live chat: support@magezon.com.

