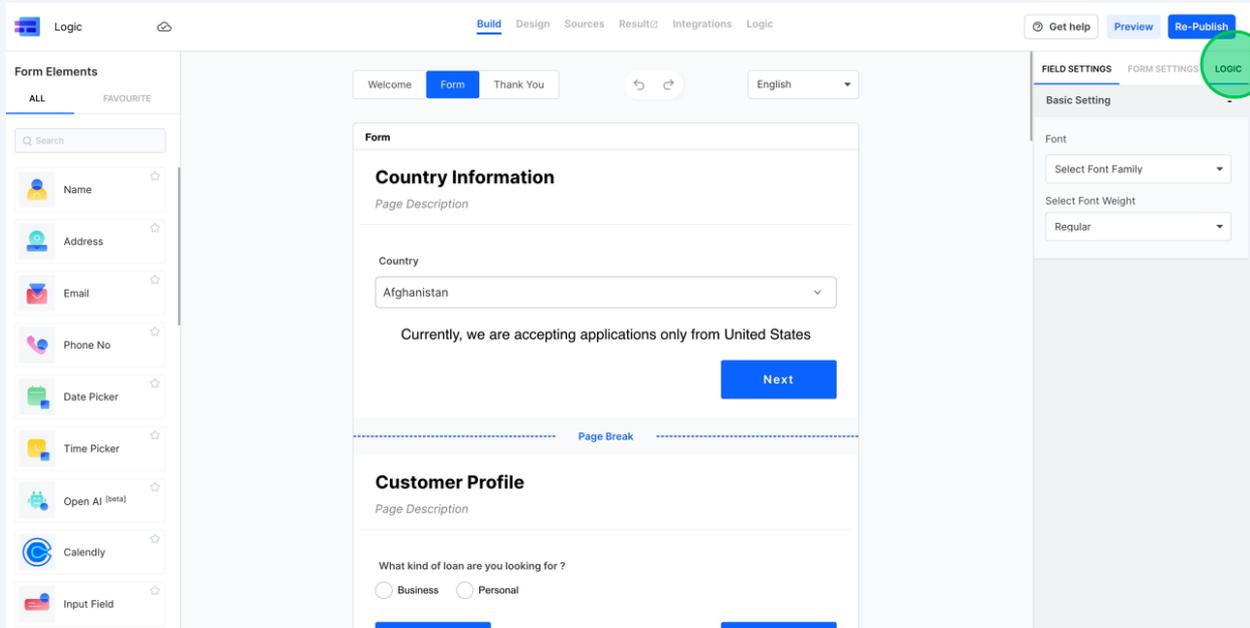


# Step-by-step guide to completing a loan application form

1 Having completed the form setup, we can now move on to implementing logic. To do this, simply select the "Logic" tab located on the right sidebar.



2

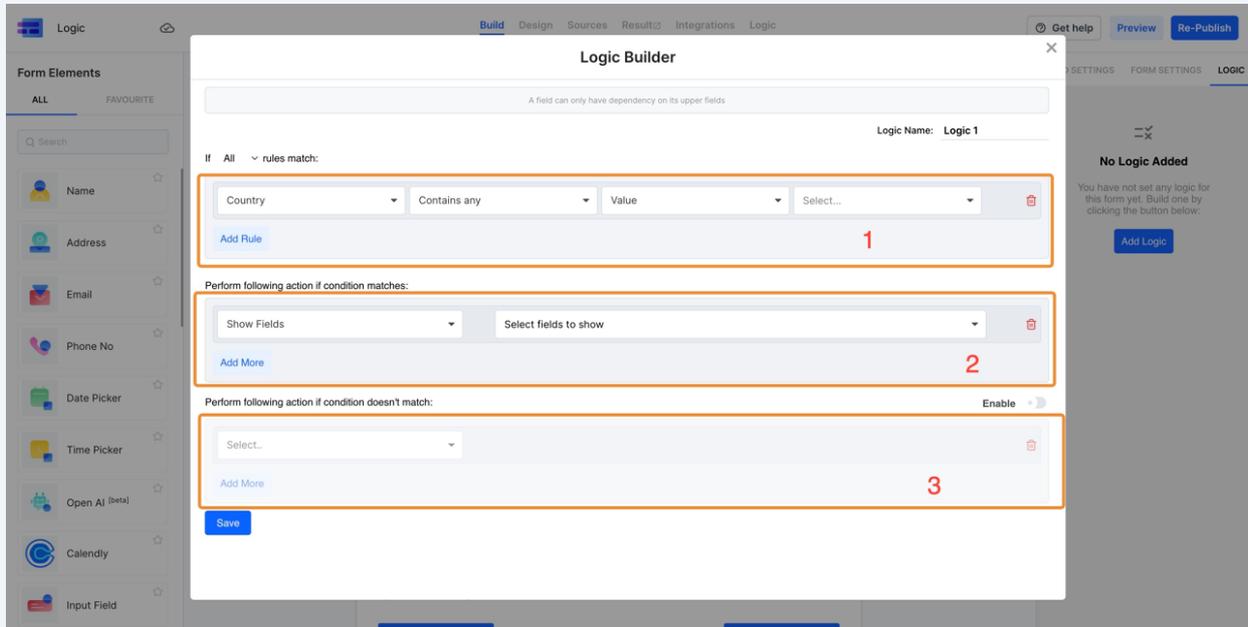
Upon navigating to the logic section, you'll notice an empty screen since no logical conditions have been set yet. To begin, click on the "Add Logic" button. For our initial logic setup, we'll configure it to permit only users from the United States to access the assessment form.

The screenshot displays a two-pane interface for configuring a form. The left pane shows a form with a language dropdown set to 'English', several empty input fields, and a dropdown menu. Below the form, the text 'itions only from United States' is visible, and a blue 'Next' button is at the bottom. The right pane has a header with 'FIELD SETTINGS', 'FORM SETTINGS', and 'LOGIC' (the active tab). The main content of the right pane shows a 'No Logic Added' message with a crossed-out equals sign icon. Below the message is an 'Add Logic' button, which is highlighted with a green circle.

3

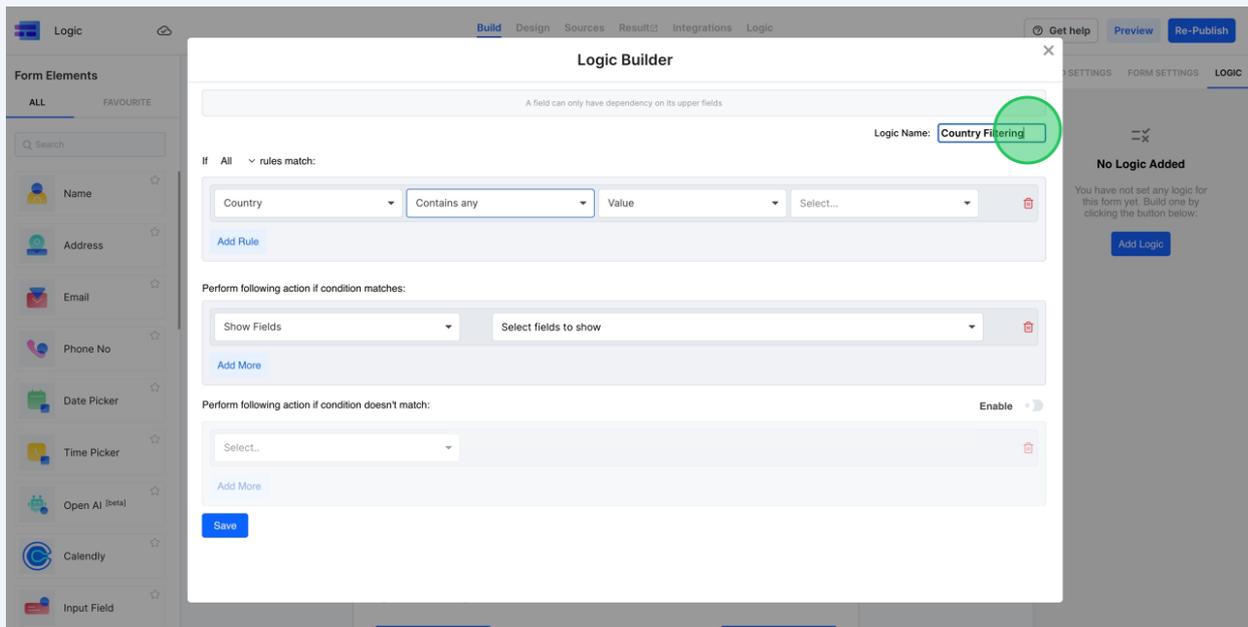
Once you select the "Add Logic" button, the Logic Builder interface will appear. This builder is divided into three distinct sections:

1. The Condition
2. Actions to execute when the condition is met
3. Actions to execute when the condition is not met.



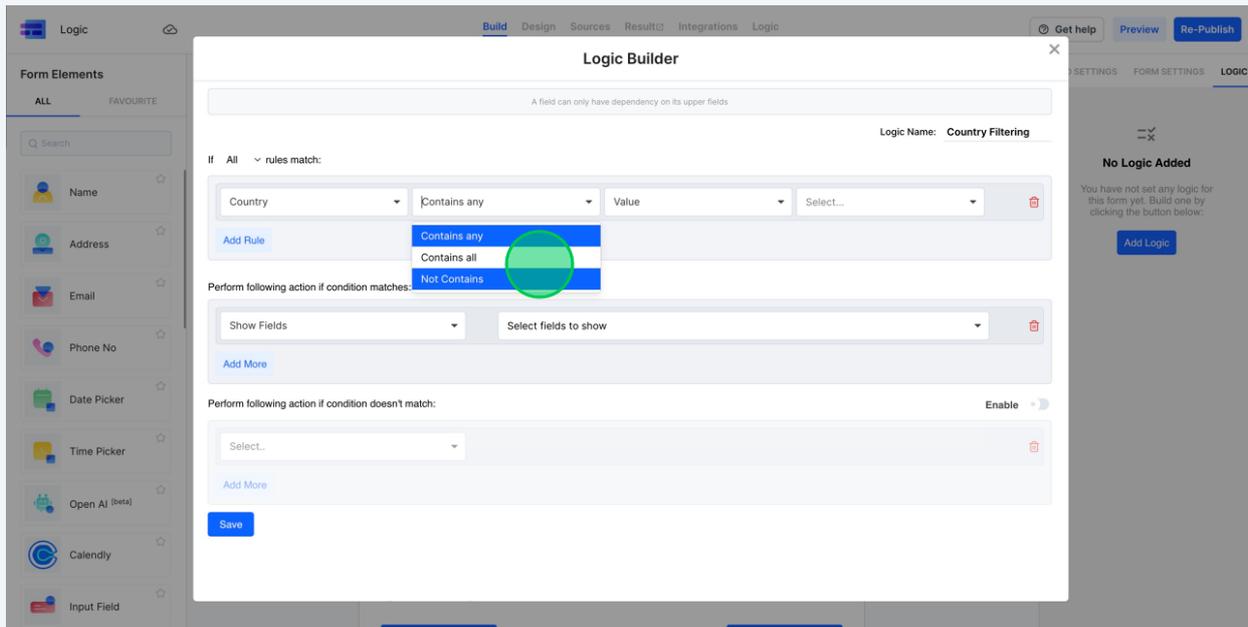
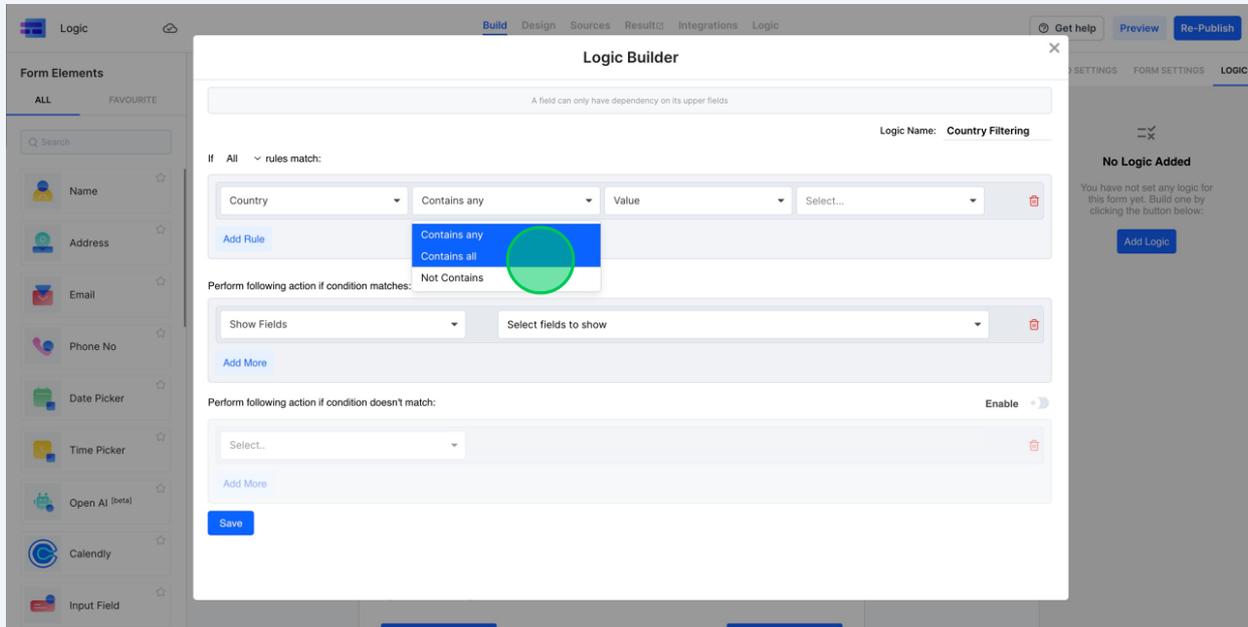
4

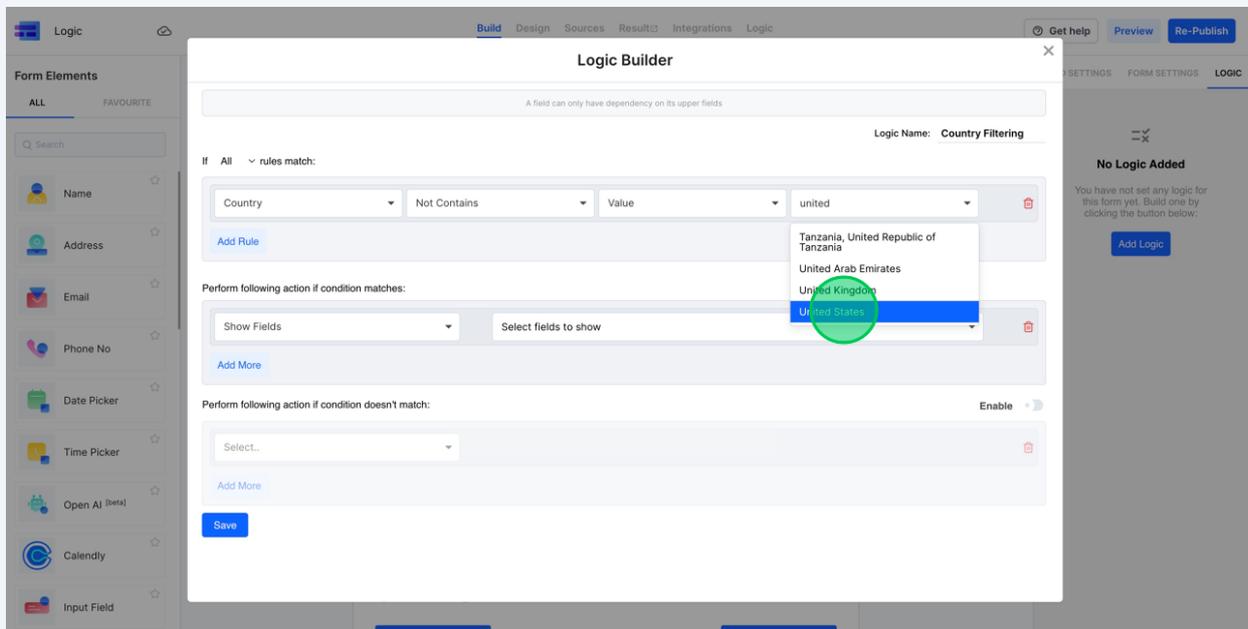
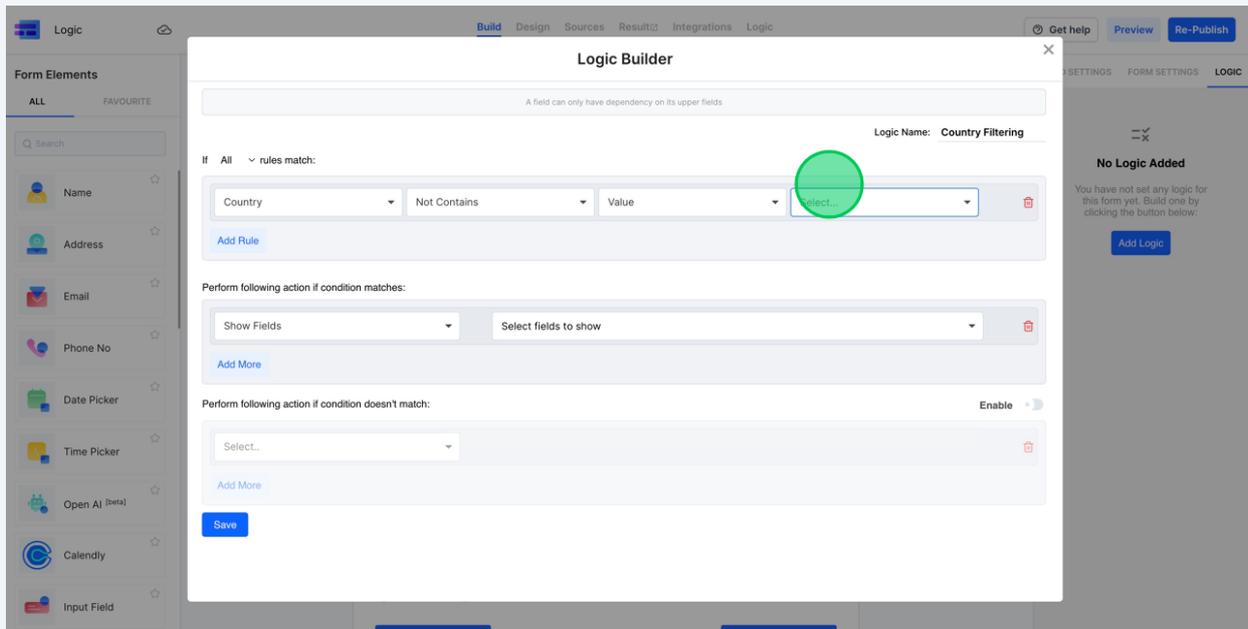
For ease of future reference, you have the option to assign a name to the condition. In this case, we'll label our initial logic "Country Filtering".



5

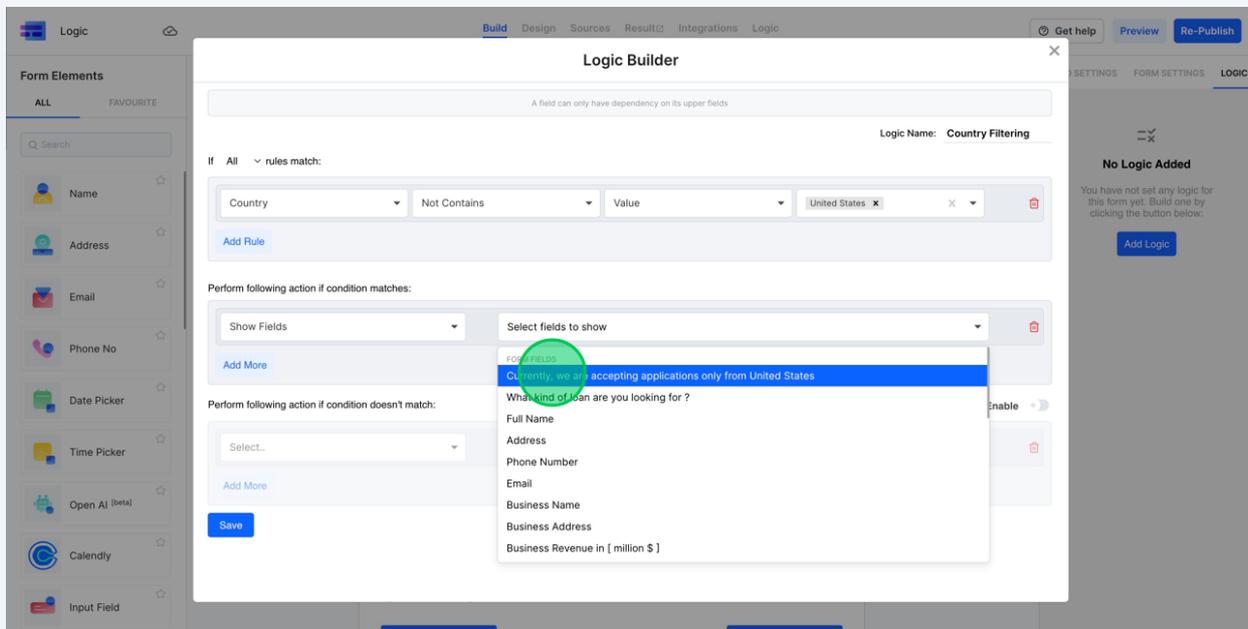
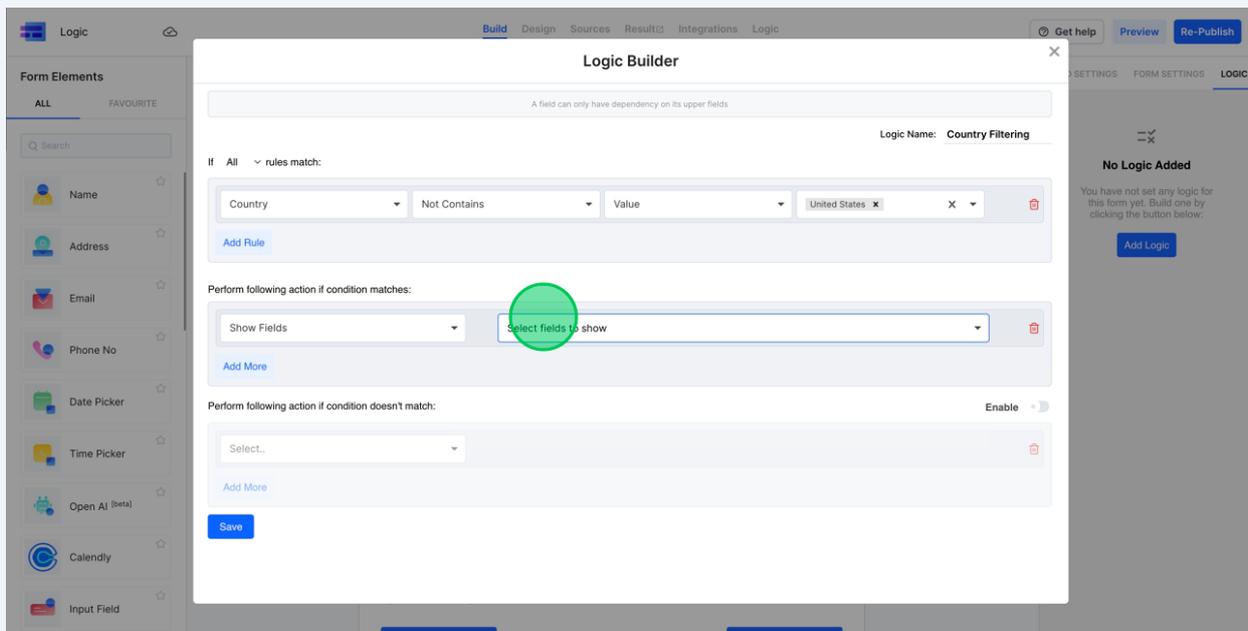
Our objective is to configure the logic so that the system verifies the "Country" field. If the input for the Country field is anything other than "United States", we want to conceal all subsequent steps and display a message to the user. To achieve this, we'll use the "Not Contains" logic option and specify it for the value "United States".





6

If the country specified isn't "United States", we want to display the message "Currently, we are accepting applications only from the United States." To implement this, in the "condition matches" section, select the "Show Fields" option and then pick the paragraph text.



7

Following that, since the user isn't from the "United States", we aim to bypass all subsequent steps. To achieve this, click on the "Add More" button, choose the "Skip Steps" option, and then select all the steps you intend to skip.

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Perform following action if condition doesn't match:

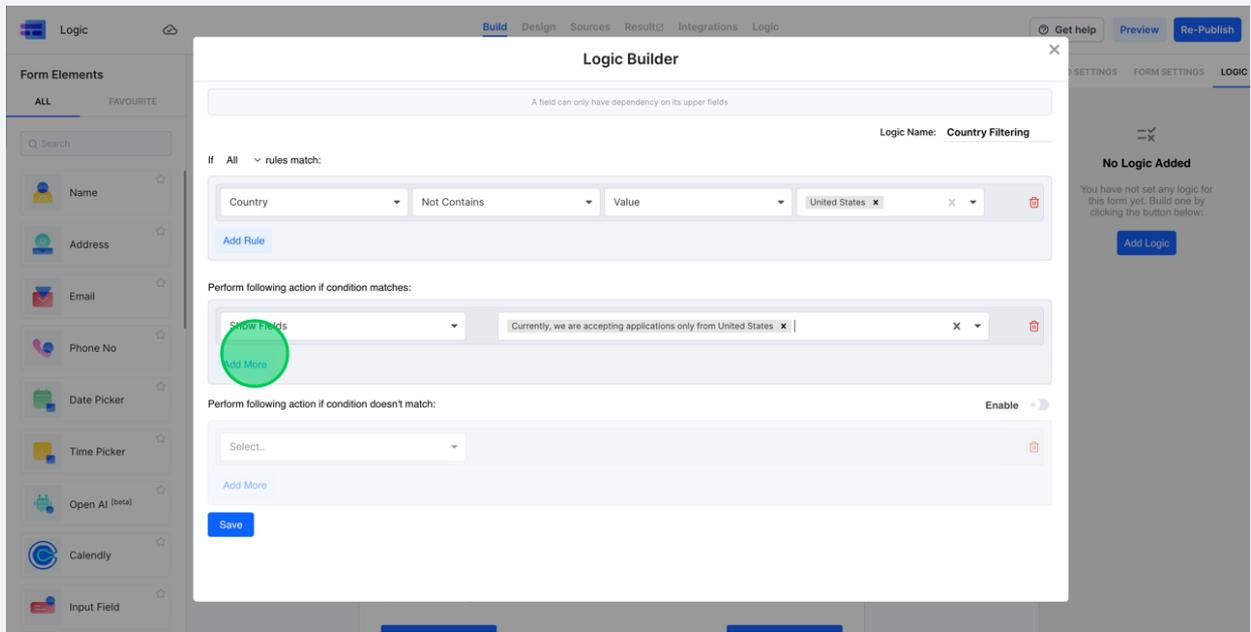
Select..

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic



Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Hide Fields Select fields to hide

Perform following action if condition doesn't match:

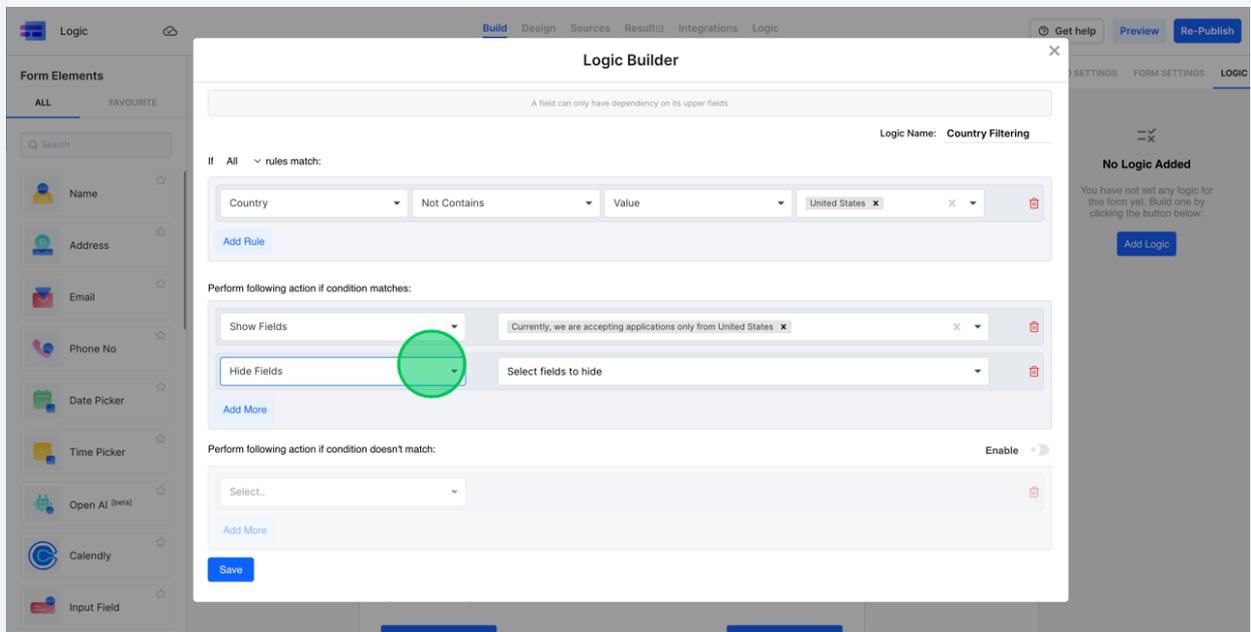
Select..

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic



Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

- Show Fields
- Hide Fields
- Enable Fields
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step
- Change value of

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Save

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

- Show Fields
- Skip Step

Perform following action if condition doesn't match:

Select..

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Save

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Skip Step Select step to skip

Perform following action if condition doesn't match:

Select..

Save

Customer Profile

Personal Details

Business Details

Address

Personal Loan Details

Business Loan Details

Business Loan Application Status

Personal Loan Application Status

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Skip Step Customer Profile

Perform following action if condition doesn't match:

Select..

Save

Personal Details

Business Details

Address

Personal Loan Details

Business Loan Details

Business Loan Application Status

Personal Loan Application Status

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Skip Step Customer Profile

Perform following action if condition doesn't match:

Select..

Save

Personal Details

Business Details

Address

Personal Loan Details

Business Loan Details

Business Loan Application Status

Personal Loan Application Status

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Skip Step Customer Profile Personal Details

Perform following action if condition doesn't match:

Select..

Save

Business Details

Address

Personal Loan Details

Business Loan Details

Business Loan Application Status

Personal Loan Application Status

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Skip Step Customer Profile Personal Details

Perform following action if condition doesn't match:

Select...

Business Details

Address

Personal Loan Details

Business Loan Details

Business Loan Application Status

Personal Loan Application Status

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Skip Step Customer Profile Personal Details Business Details

Perform following action if condition doesn't match:

Select...

Address

Personal Loan Details

Business Loan Details

Business Loan Application Status

Personal Loan Application Status

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

- Country Not Contains Value United States

Perform following action if condition matches:

- Show Fields: Currently, we are accepting applications only from United States
- Skip Step: Customer Profile | Personal Details | Business Details

Perform following action if condition doesn't match:

- Select...

Address

- Personal Loan Details
- Business Loan Details
- Business Loan Application Status
- Personal Loan Application Status

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

- Country Not Contains Value United States

Perform following action if condition matches:

- Show Fields: Currently, we are accepting applications only from United States
- Skip Step: Customer Profile | Personal Details | Business Details

Perform following action if condition doesn't match:

- Select...

Address

- Personal Loan Details
- Business Loan Details
- Business Loan Application Status
- Personal Loan Application Status

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder interface showing a rule configuration for "Country Filtering".

**Logic Name:** Country Filtering

**Condition:** If All rules match:  
Country Not Contains Value United States

**Action:** Perform following action if condition matches:  
Show Fields: Currently, we are accepting applications only from United States  
Skip Step: Customer Profile | Personal Details | Business Details | Address

**Buttons:** Add Rule, Add More, Save

**Right Panel:** No Logic Added. You have not set any logic for this form yet. Build one by clicking the button below. Add Logic

Logic Builder interface showing a dropdown menu for the Skip Step action.

**Logic Name:** Country Filtering

**Condition:** If All rules match:  
Country Not Contains Value United States

**Action:** Perform following action if condition matches:  
Show Fields: Currently, we are accepting applications only from United States  
Skip Step: Customer Profile | Personal Details | Business Details | Address

**Dropdown Menu:** Business Loan Details, Business Loan Application Status, Personal Loan Application Status

**Buttons:** Add Rule, Add More, Save

**Right Panel:** No Logic Added. You have not set any logic for this form yet. Build one by clicking the button below. Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

- Country Not Contains Value United States

Perform following action if condition matches:

- Show Fields: Currently, we are accepting applications only from United States
- Skip Step: Customer Profile, Personal Details, Business Details, Address, Personal Loan Details

Perform following action if condition doesn't match:

- Select...

Business Loan Details  
Business Loan Application Status  
Personal Loan Application Status

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

- Country Not Contains Value United States

Perform following action if condition matches:

- Show Fields: Currently, we are accepting applications only from United States
- Skip Step: Customer Profile, Personal Details, Business Details, Address, Personal Loan Details, Business Loan Details

Perform following action if condition doesn't match:

- Select...

Business Loan Application Status  
Personal Loan Application Status

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Skip Step Customer Profile Personal Details Business Details Address Personal Loan Details Business Loan Details

Business Loan Application Status

Personal Loan Application Status

Perform following action if condition doesn't match:

Select...

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

Logic Builder

Logic Name: Country Filtering

If All rules match:

Country Not Contains Value United States

Perform following action if condition matches:

Show Fields Currently, we are accepting applications only from United States

Skip Step Customer Profile Personal Details Business Details Address Personal Loan Details Business Loan Details Business Loan Application Status

Personal Loan Application Status

Perform following action if condition doesn't match:

Select...

Save

No Logic Added

You have not set any logic for this form yet. Build one by clicking the button below.

Add Logic

8 To finalize and store this logic configuration, simply click the "Save" button.

Show Fields Currently, we are accepting...

Skip Step

Customer Profile × Personal Loan Details × Personal Loan Application St

Add More

Perform following action if condition doesn't match:

Select..

Add More

Save

9 To promptly verify this condition, click on the "Design Tab"

Logic Build Design Sources Result Integrations Logic

Get help Preview Re-Publish

Form Elements

ALL FAVOURITE

Name Address Email Phone No Date Picker Time Picker Open AI [beta] Calendly Input Field

Welcome Form Thank You English

Form

Country Information

Page Description

Country

Afghanistan

Currently, we are accepting applications only from United States

Next

Page Break

Customer Profile

Page Description

What kind of loan are you looking for?

Business  Personal

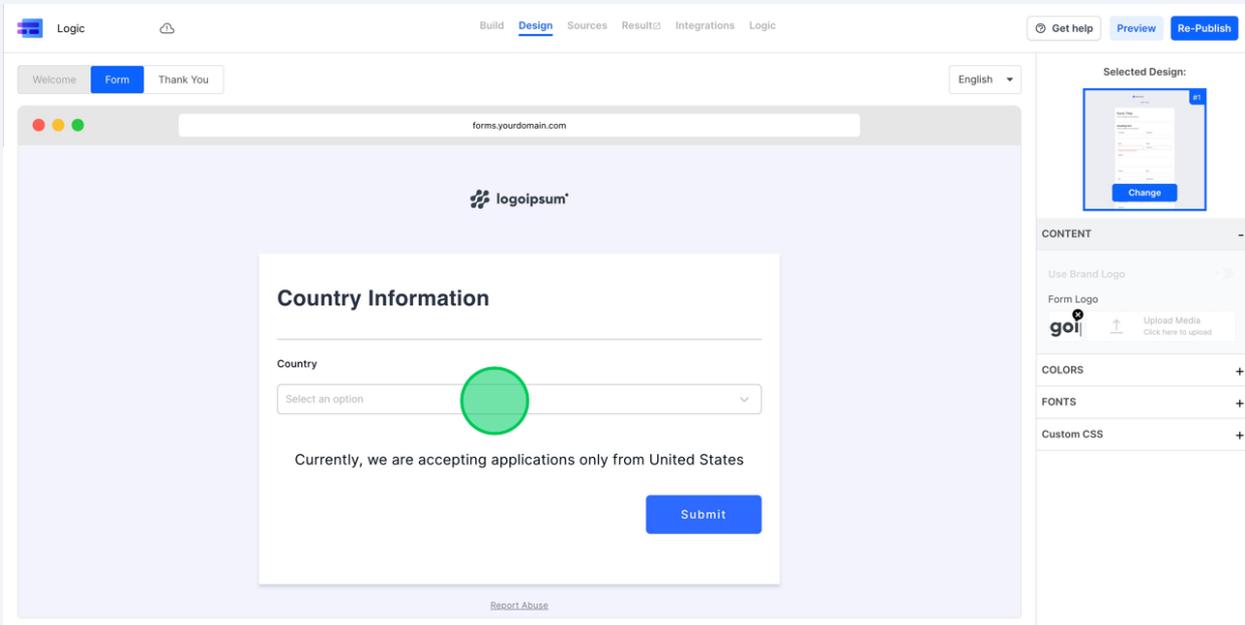
FIELD SETTINGS FORM SETTINGS LOGIC

Country Filtering

Create New Condition

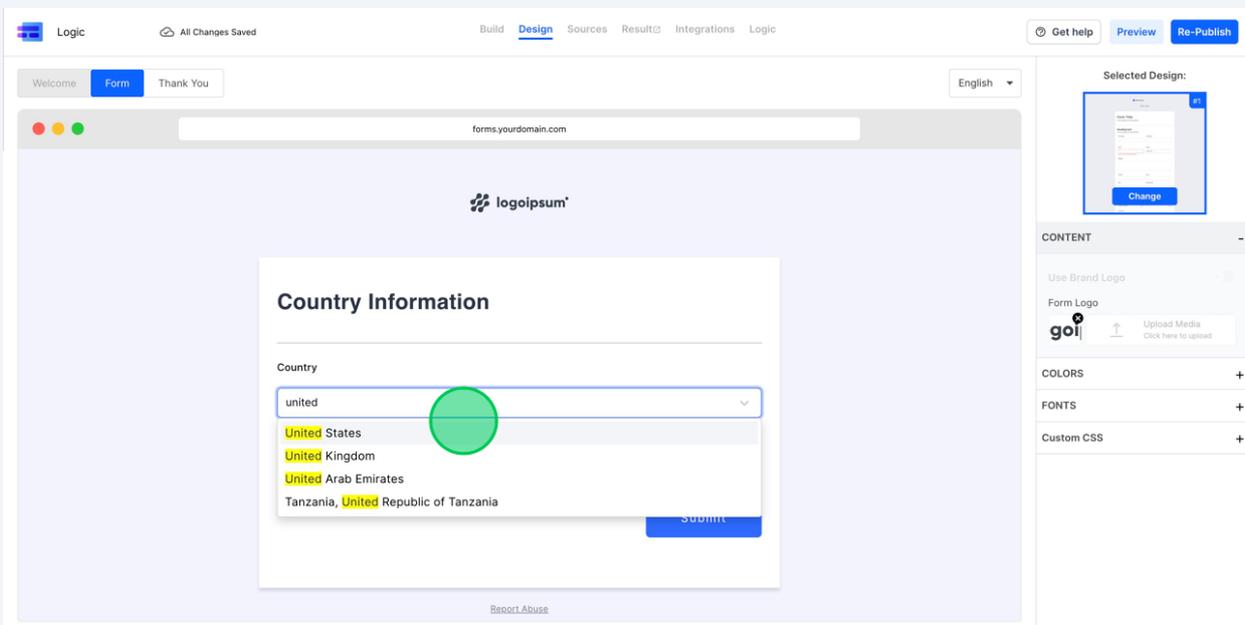
10

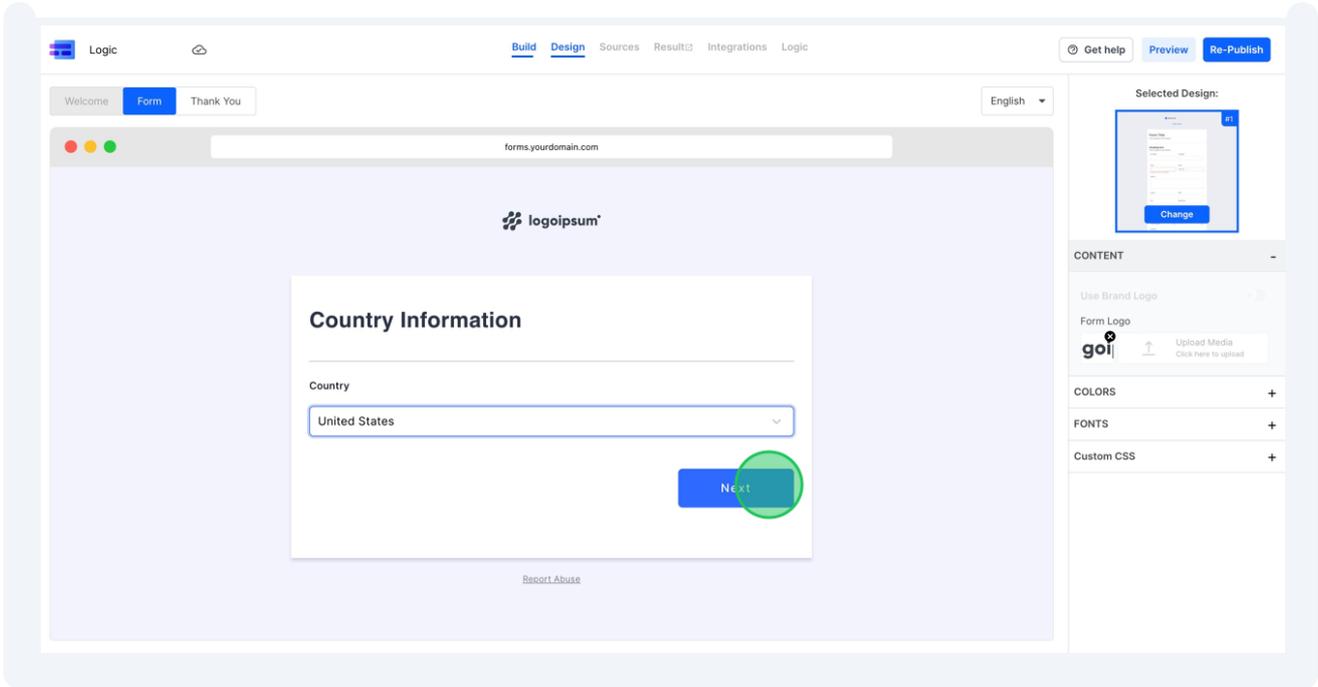
With no country selected by default, the display correctly shows the message indicating that applications are currently not being accepted from outside the United States.



11

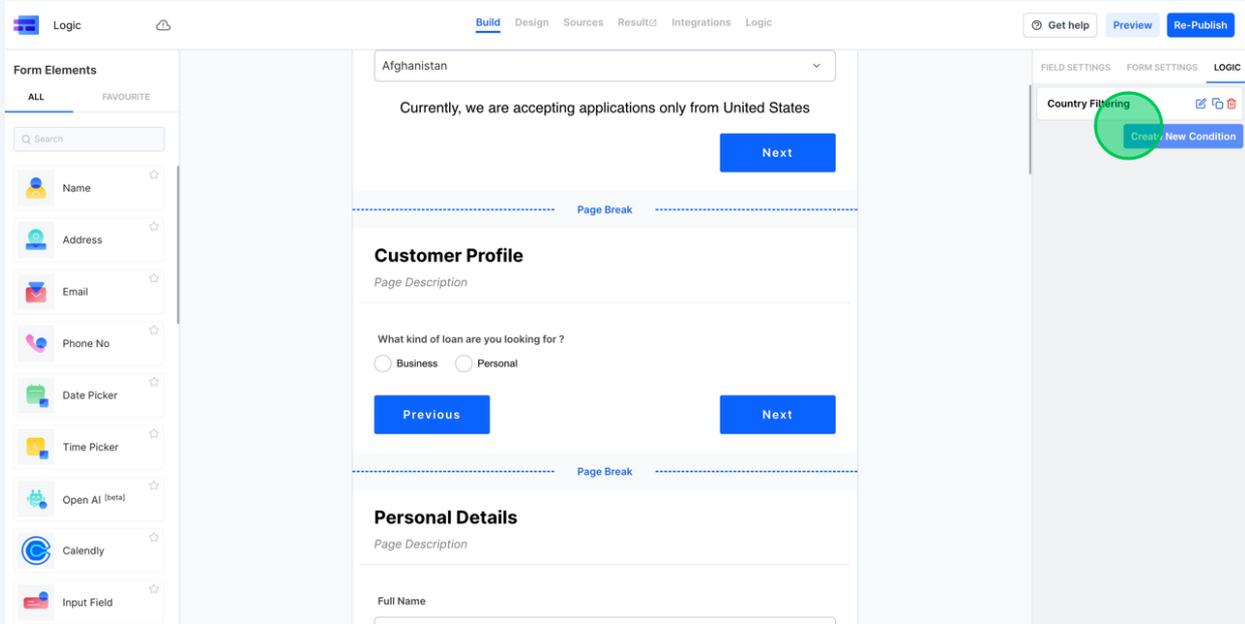
Upon choosing "United States" from the options, the previously displayed message vanishes, and we are provided with the "Next" button, allowing us to move forward.



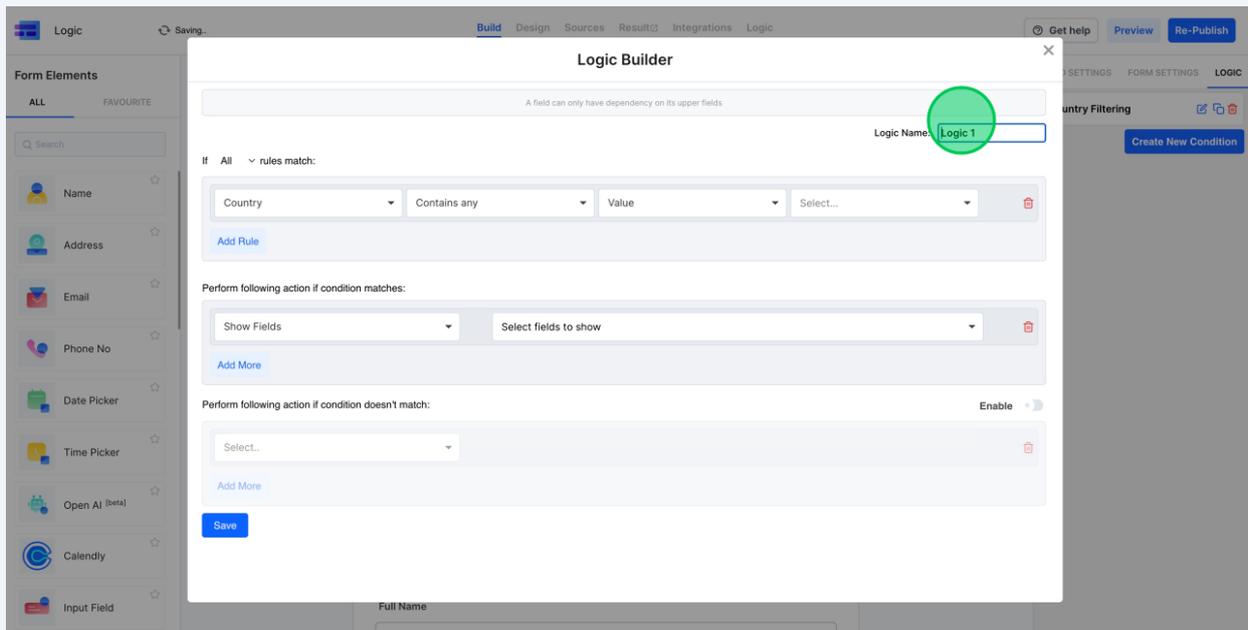


12

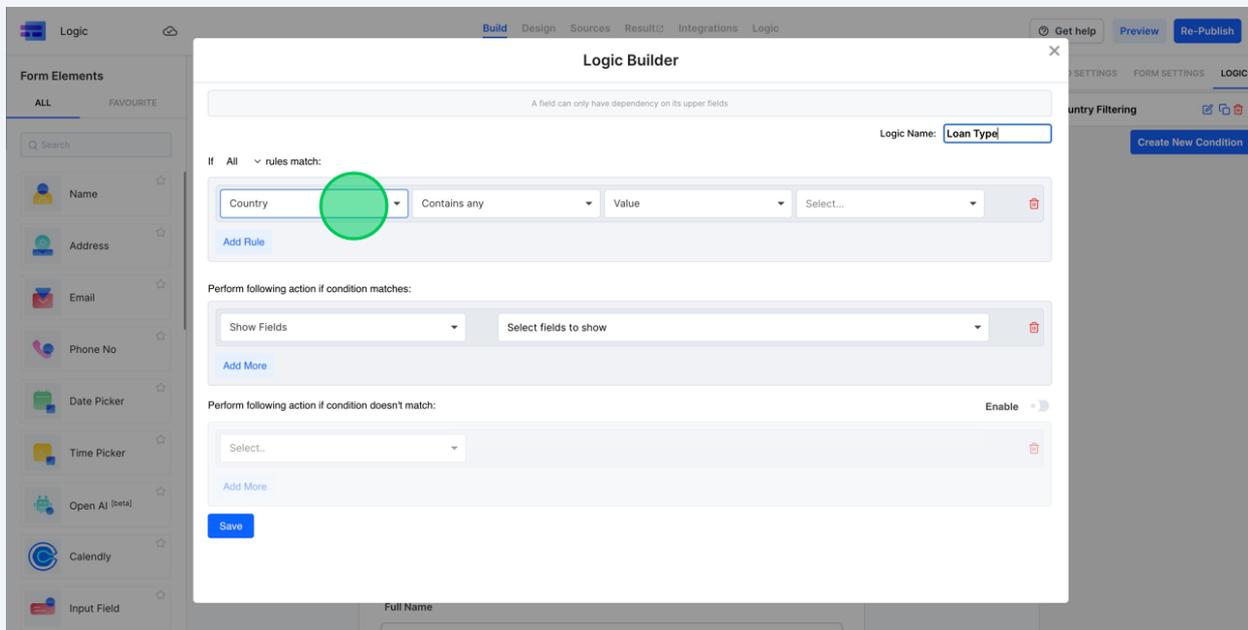
Next, we'll work on setting up a condition that hides specific steps based on the type of loan the user is applying for. Remember, there's no cap on the number of conditions you can configure. Navigate to "Logic" and you'll observe the "Country Filtering" condition we previously established. To create a new condition, simply click on the "Create New Condition" button.

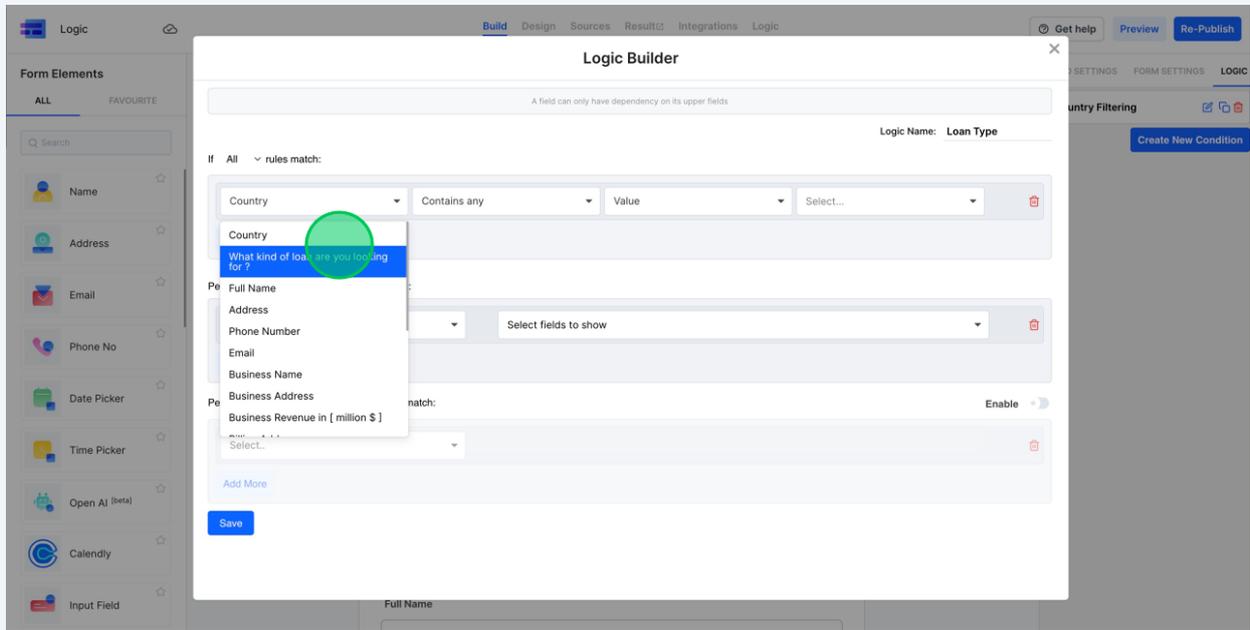
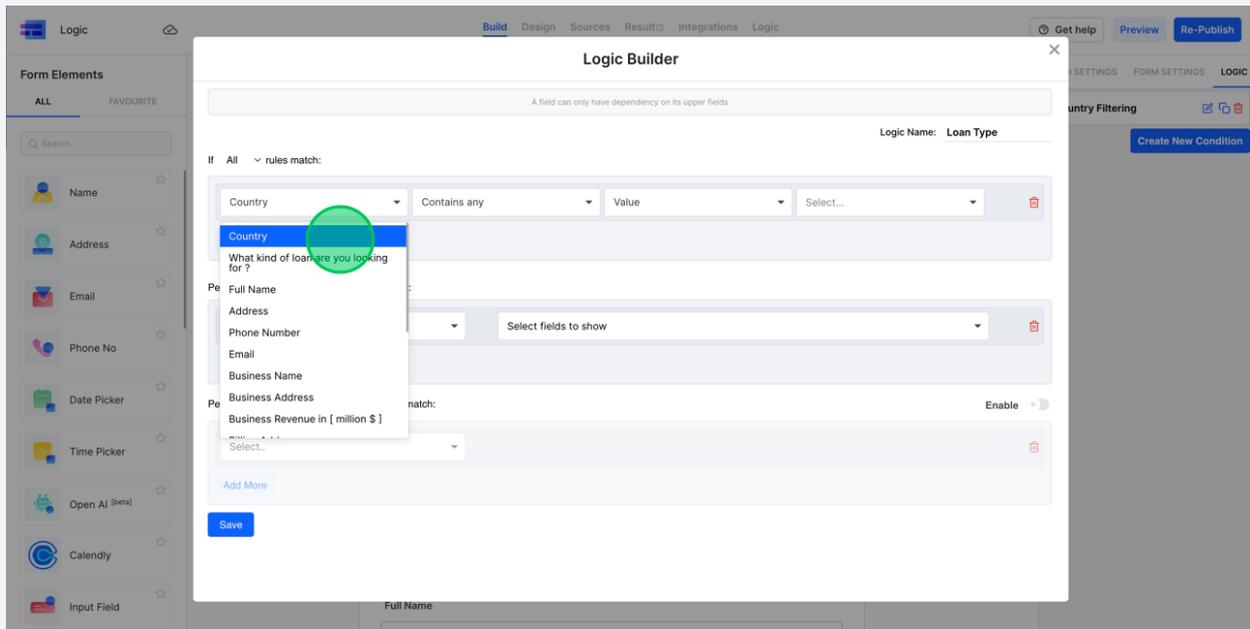


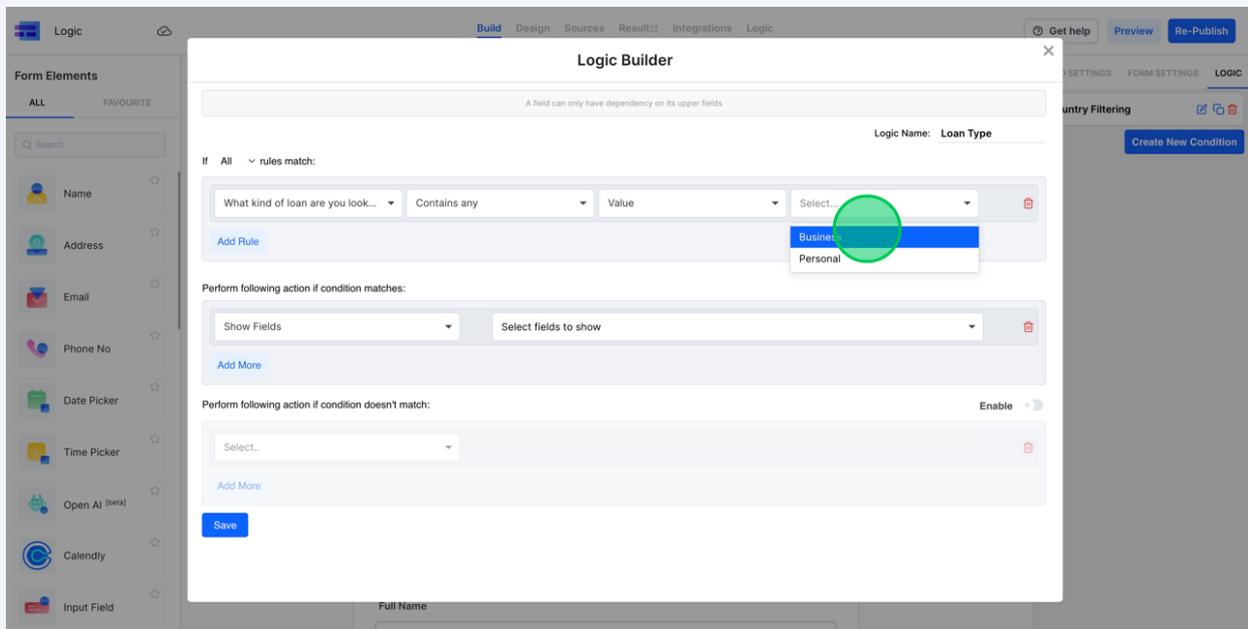
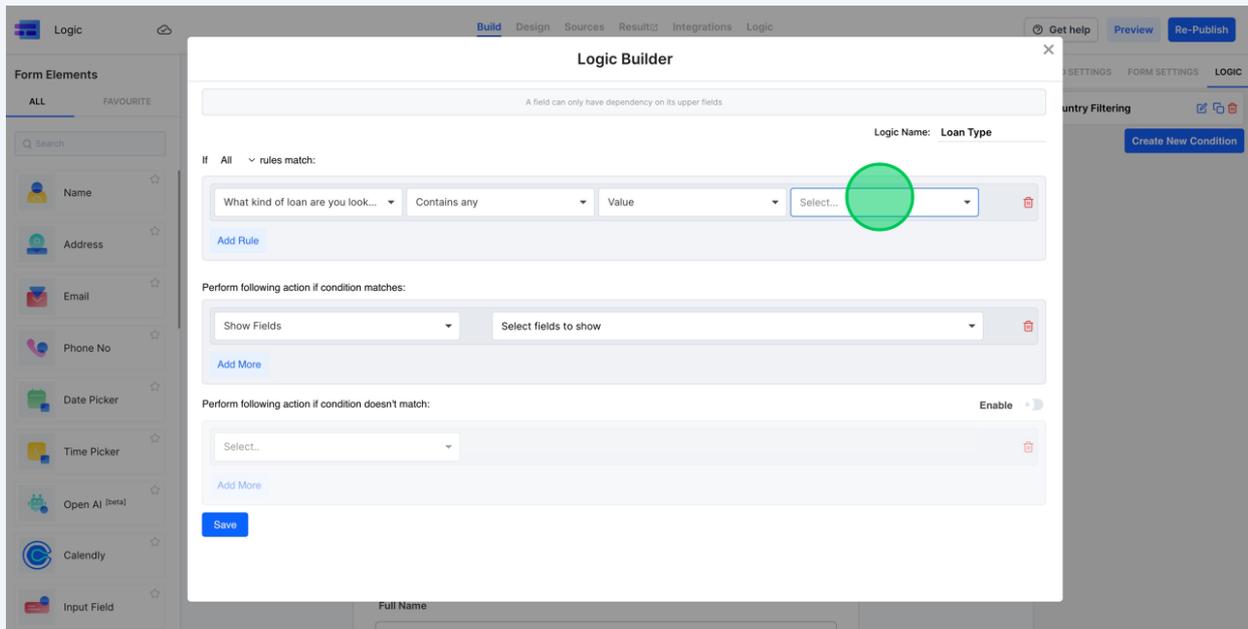
13 We'll label this new condition as "Loan Type".



14 Initially, we'll define the condition. To achieve this, we'll evaluate the response to the question "What kind of loan are you looking for?". For our condition, we'll set the comparison value to "Business".

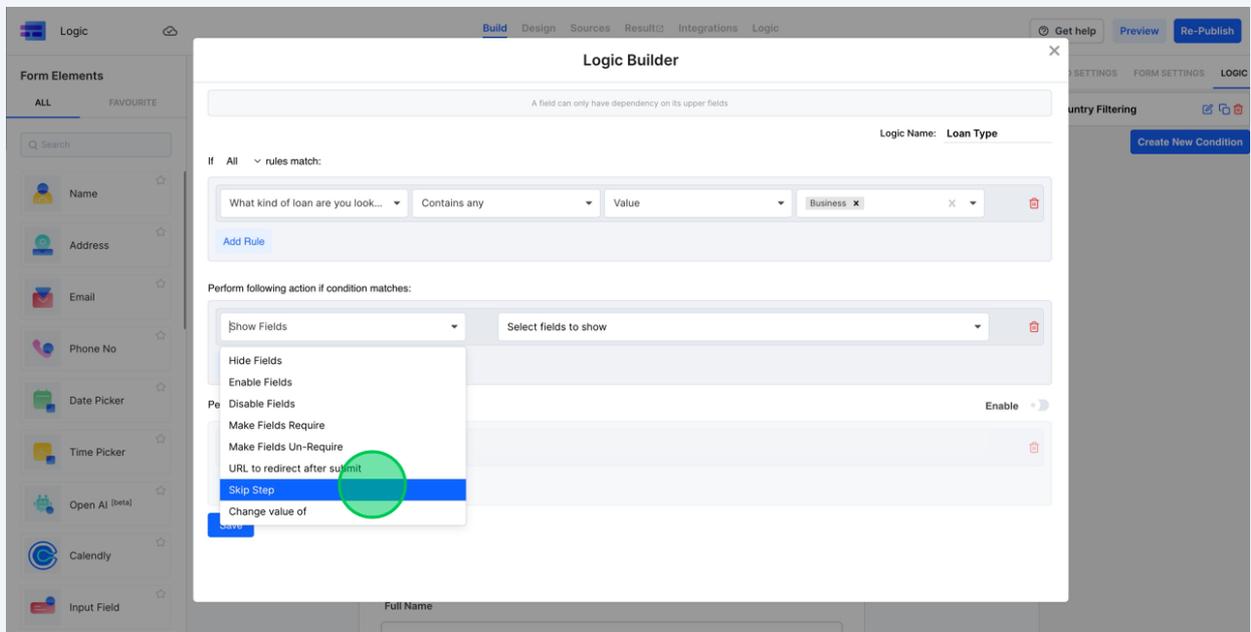
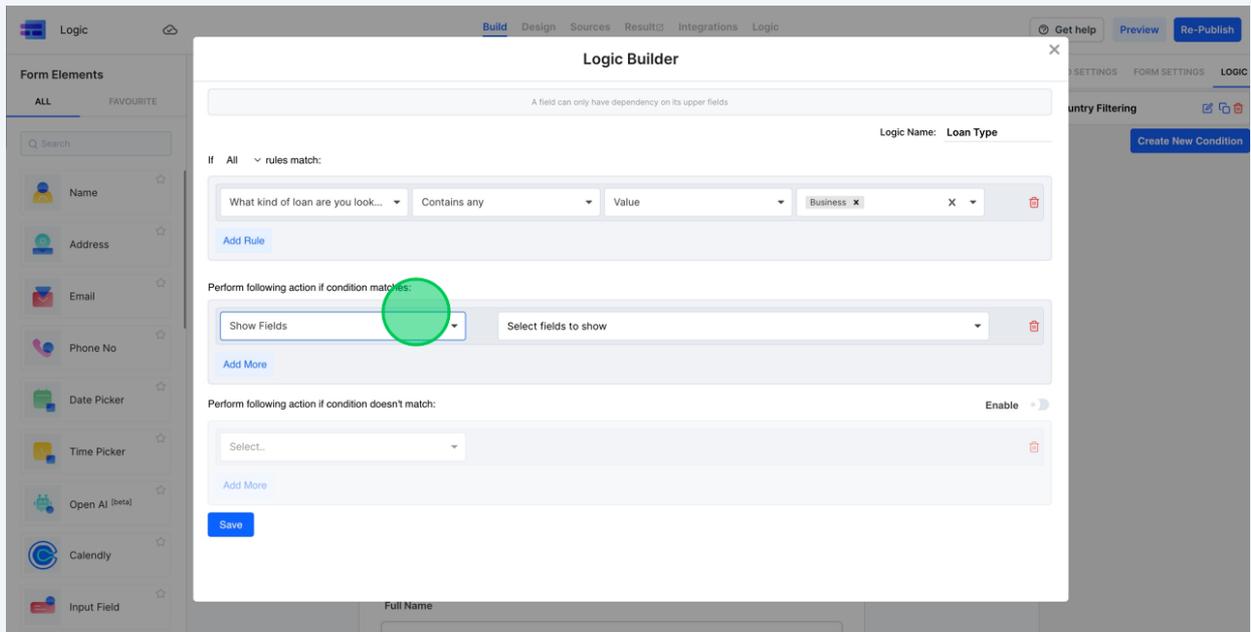


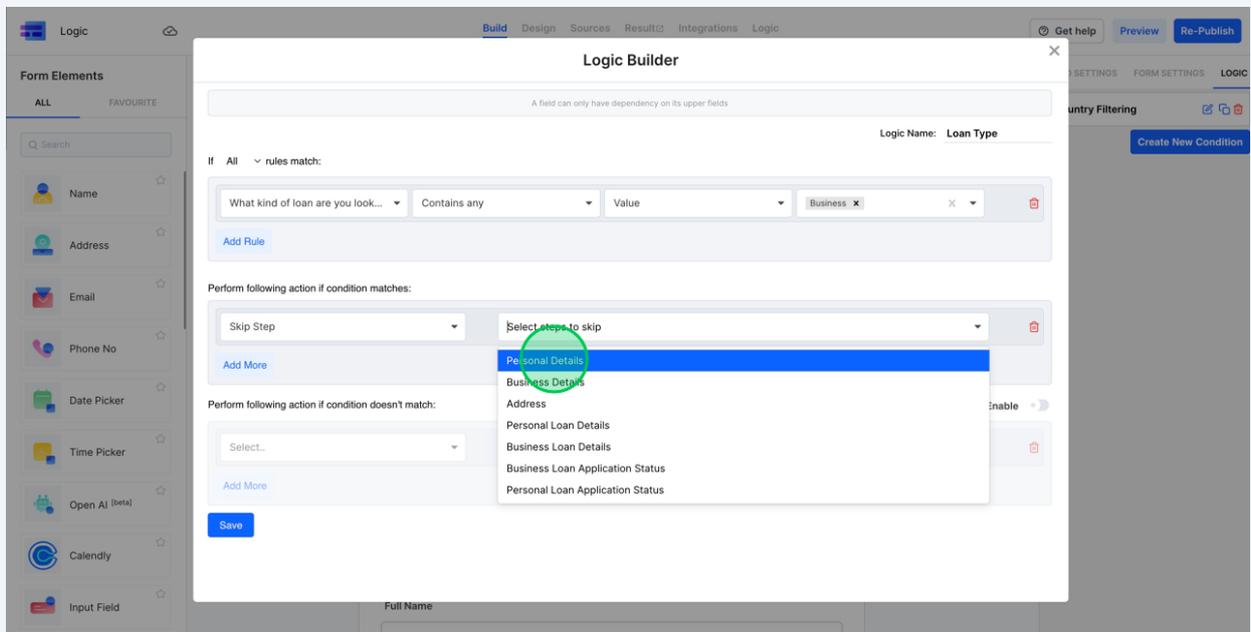
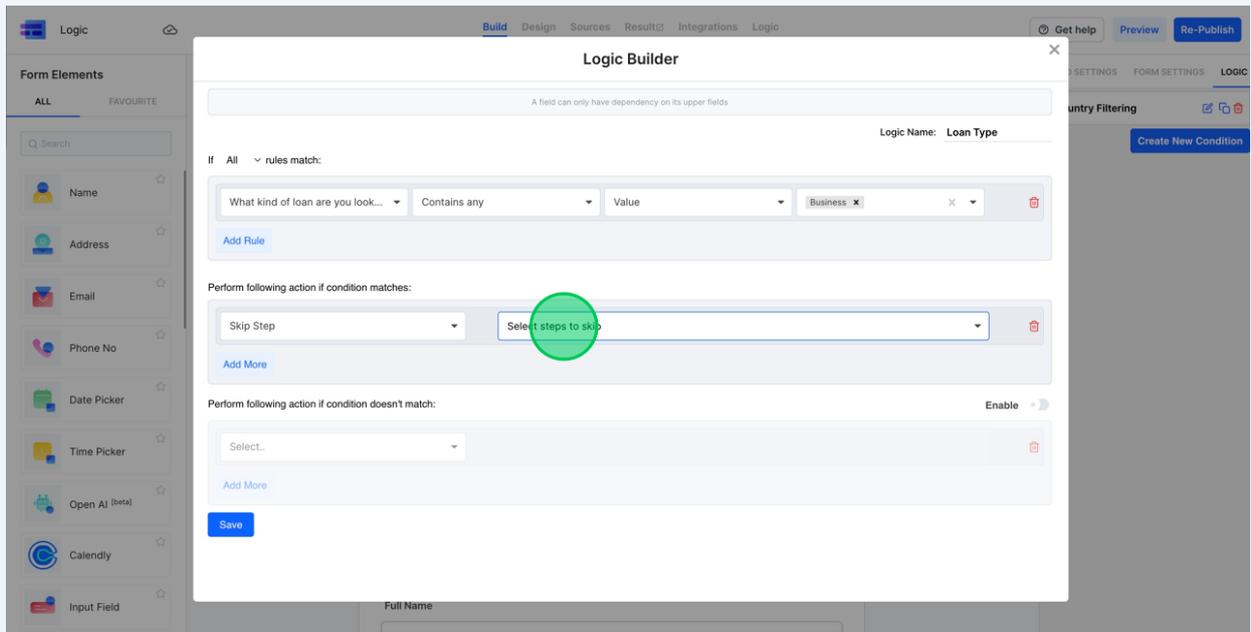




15

If the set condition is met, we aim to bypass all the steps pertaining to "Personal Loan". To implement this, choose the "Skip Steps" option and then pick all the relevant steps you intend to skip. In this scenario, the steps to be skipped are "Personal Details", "Personal Loan Details", and "Personal Loan Application Status".





Logic Builder interface showing a rule configuration for "Loan Type".

**Logic Name:** Loan Type

**Condition:** If All rules match:  
What kind of loan are you look... Contains any Value Business

**Action if condition matches:** Skip Step Personal Details

**Action if condition doesn't match:** Select..

**Dropdown menu options:** Business Details, Address, Personal Loan Details, Business Loan Details, Business Loan Application Status, Personal Loan Application Status

**Buttons:** Add Rule, Add More, Save

Logic Builder interface showing a rule configuration for "Loan Type".

**Logic Name:** Loan Type

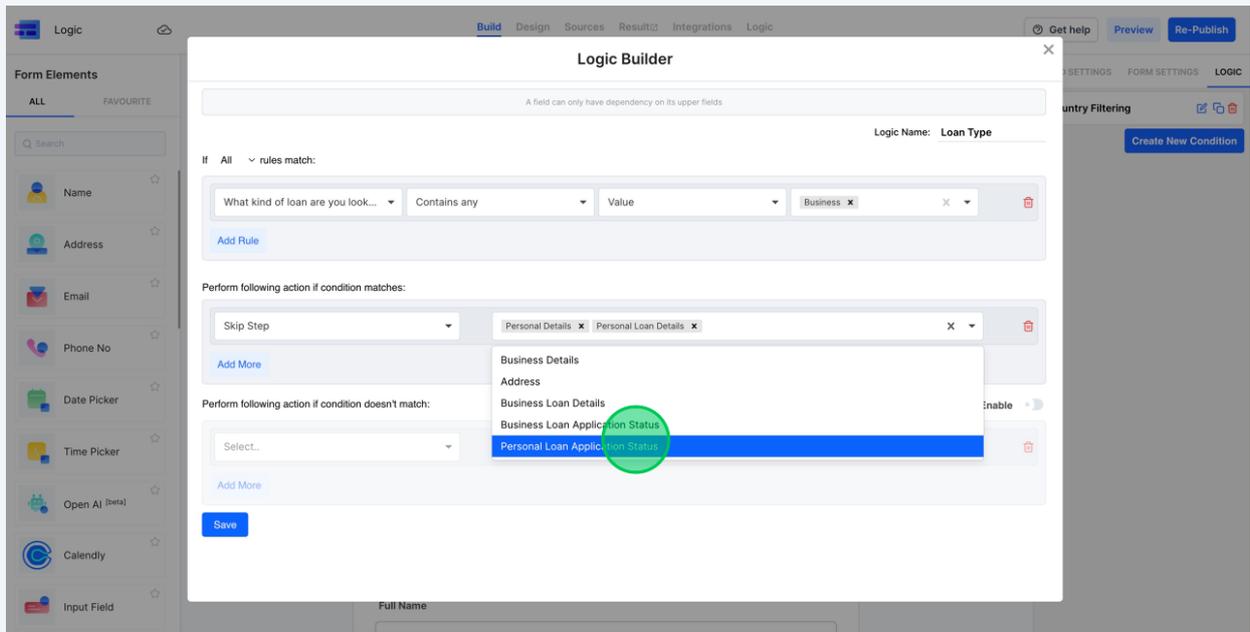
**Condition:** If All rules match:  
What kind of loan are you look... Contains any Value Business

**Action if condition matches:** Skip Step Personal Details

**Action if condition doesn't match:** Select..

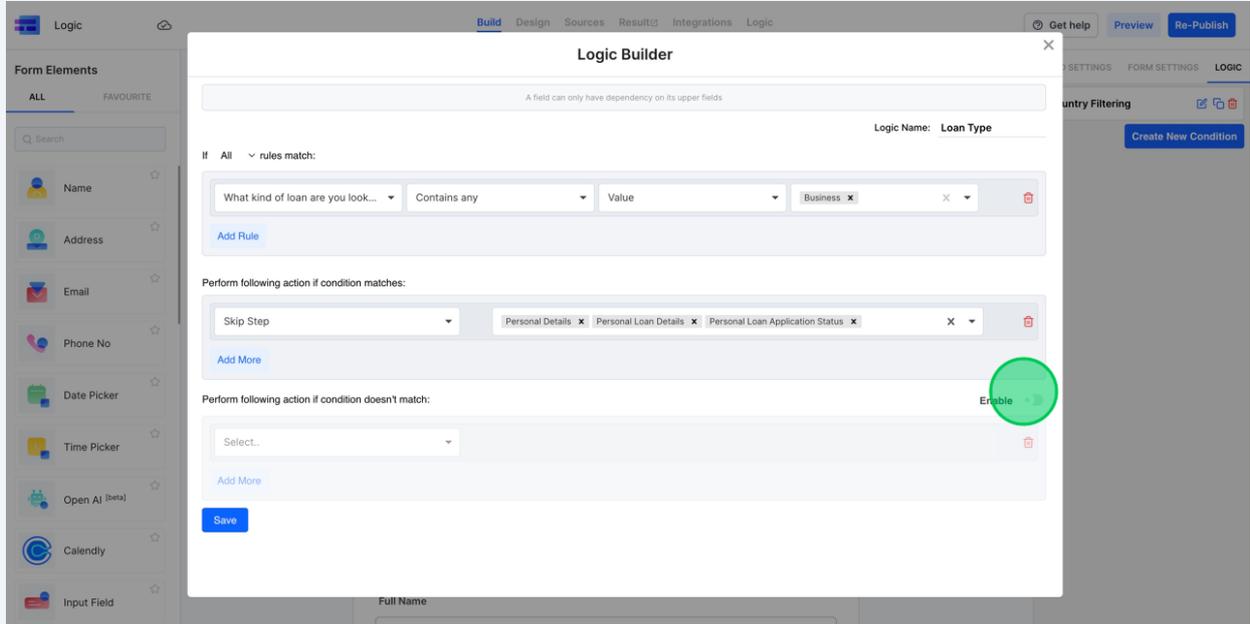
**Dropdown menu options:** Business Details, Address, Personal Loan Details, Business Loan Details, Business Loan Application Status, Personal Loan Application Status

**Buttons:** Add Rule, Add More, Save



16

When the set condition isn't met, we'll hide all steps associated with "Business Loan". Given that our primary condition checks if the Loan Type is "Business" and conceals all steps related to Personal Loan, the "condition doesn't match" section will act when the Loan Type is "Personal" and will subsequently hide all steps linked to Business Loan.



Perform following action if condition matches:

Skip Step Personal Details Personal Loan Details

Add More

Perform following action if condition doesn't match:

Show Fields Select fields to show

Add More

Save

Add Rule

- Hide Fields
- Enable Fields
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step**
- Change value of

Personal Details Personal Loan

Show Fields Select fields to show

Add More

Save

Perform following action if condition matches:

Skip Step

Personal Details x Personal Loan Details x Personal Loan Application Status

Add More

Perform following action if condition doesn't match:

Skip Step

Select steps to skip

Add More

Save

Full Name

Perform following action if condition matches:

Skip Step

Personal Details x Personal Loan Details x Personal Loan Application Status

Add More

Perform following action if condition doesn't match:

Skip Step

Select steps to skip

Add More

- Personal Details
- Business Details**
- Address
- Personal Loan Details
- Business Loan Details
- Business Loan Application Status

Save

Full Name

in matches:

▼ Personal Details x Personal Loan Details x Personal Loan Application Status x ▼

in doesn't match:

▼ Business Details x ▼

Full Name

dition matches:

▼ Personal Details x Personal Loan Details x Personal Loan Application Status x ▼

dition doesn't match:

▼ Business Details x ▼

- Personal Details
- Address
- Personal Loan Details
- Business Loan Details**
- Business Loan Application Status
- Personal Loan Application Status

Full Name

▼ Personal Details x Personal Loan Details x Personal Loan Application Status x X ▼ 

Enable

▼ Business Details x Business Loan Details x  X ▼ 

Doesn't match:

▼ Personal Details x Personal Loan Details x Personal Loan Application Status x X ▼

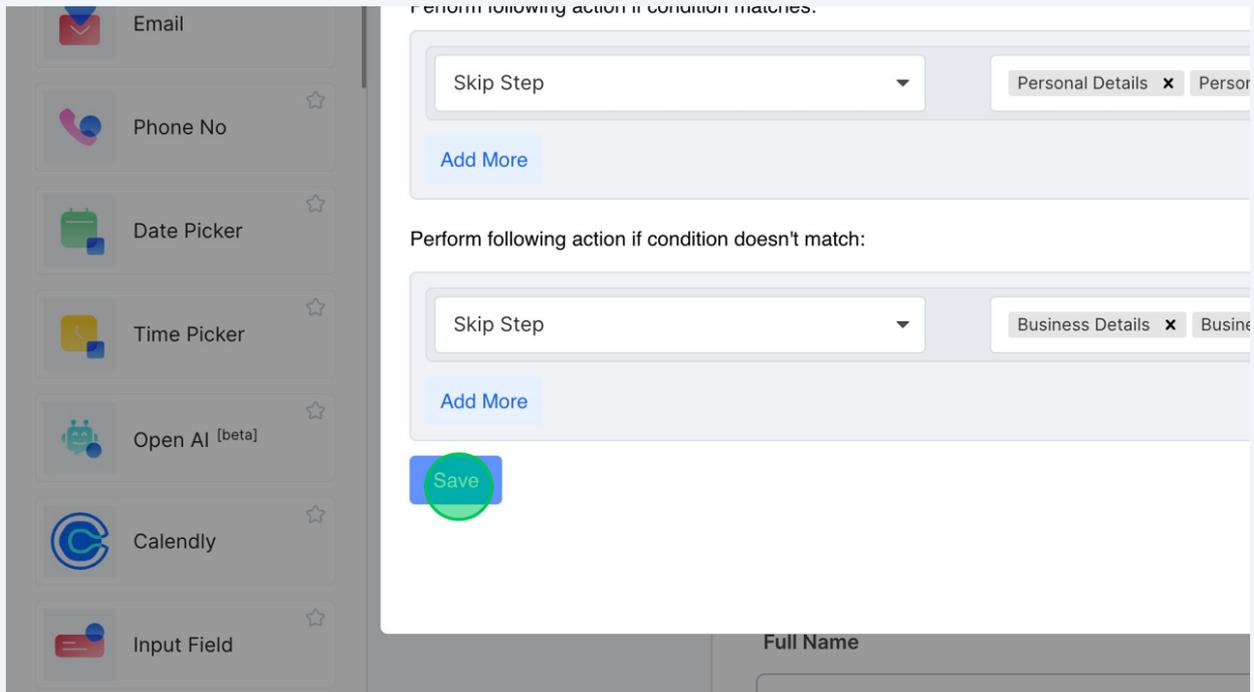
Doesn't match: Enable

▼ Business Details x Business Loan Details x X ▼

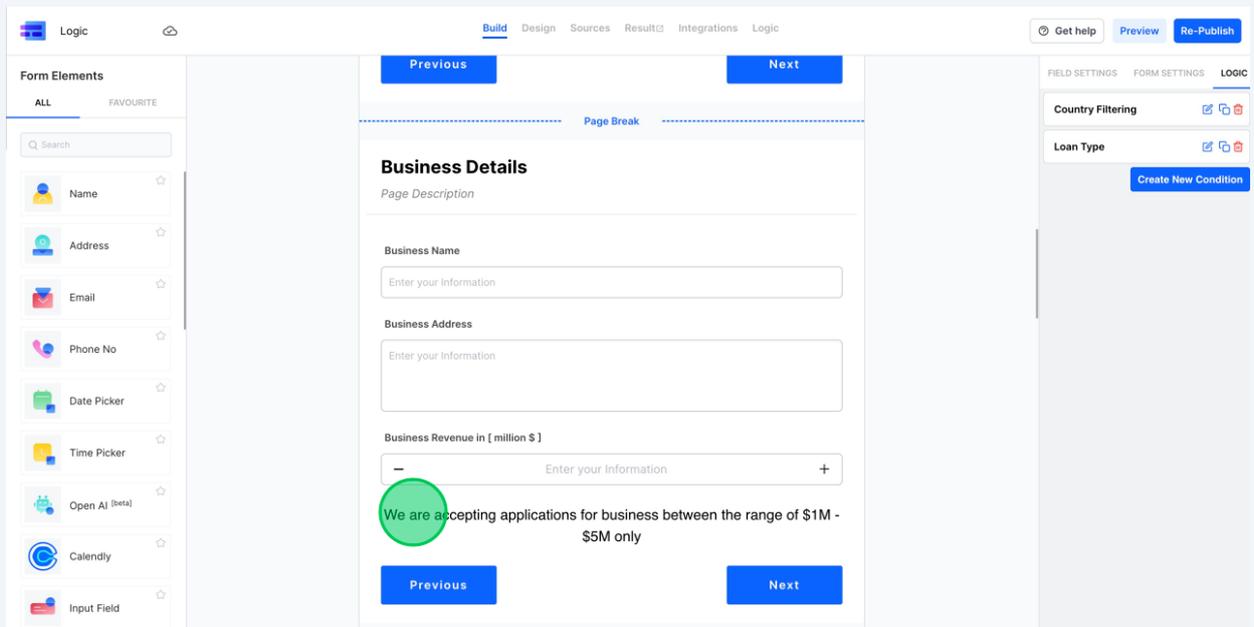
- Personal Details
- Address
- Personal Loan Details
- Business Loan Application Status** 
- Personal Loan Application Status

Full Name

17 To conclude and store this logic configuration, simply press the "Save" button.



18 Next, we're going to set up logic to evaluate a business's revenue. We're targeting businesses that report revenues between 1M to 5M. We'll use conditions to check these values.



19 Navigate to the "Logic" section, create a new condition, and label it as "Revenue Filtering".

Logic All Changes Saved Build Design Sources Results Integrations Logic Get help Preview Re-Publish

Form Elements ALL FAVOURITE

Q Search

- Name
- Address
- Email
- Phone No
- Date Picker
- Time Picker
- Open AI (beta)
- Calendly
- Input Field

Previous Next

Page Break

### Business Details

Page Description

Business Name

Enter your Information

Business Address

Enter your Information

Business Revenue in [ million \$ ]

Enter your Information

We are accepting applications for business between the range of \$1M - \$5M only

Previous Next

FIELD SETTINGS FORM SETTINGS **Logic**

Basic Setting

Font

Select Font Family

Select Font Weight

Regular

Logic All Changes Saved Build Design Sources Results Integrations Logic Get help Preview Re-Publish

Form Elements ALL FAVOURITE

Q Search

- Name
- Address
- Email
- Phone No
- Date Picker
- Time Picker
- Open AI (beta)
- Calendly
- Input Field

Previous Next

Page Break

### Business Details

Page Description

Business Name

Enter your Information

Business Address

Enter your Information

Business Revenue in [ million \$ ]

Enter your Information

We are accepting applications for business between the range of \$1M - \$5M only

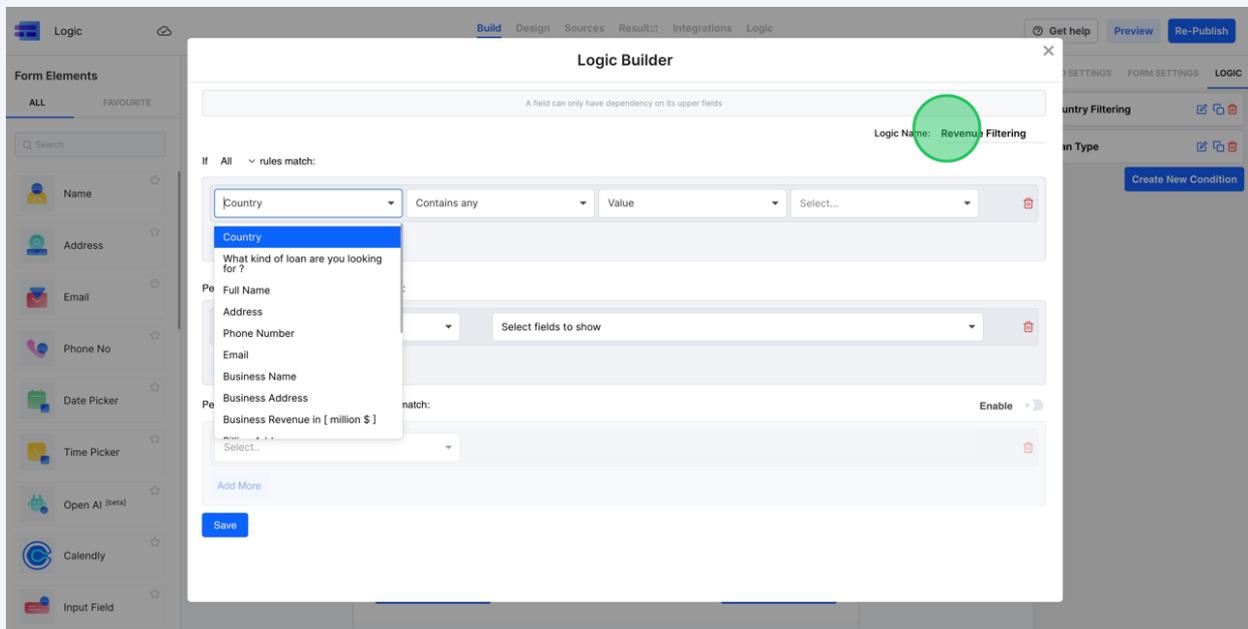
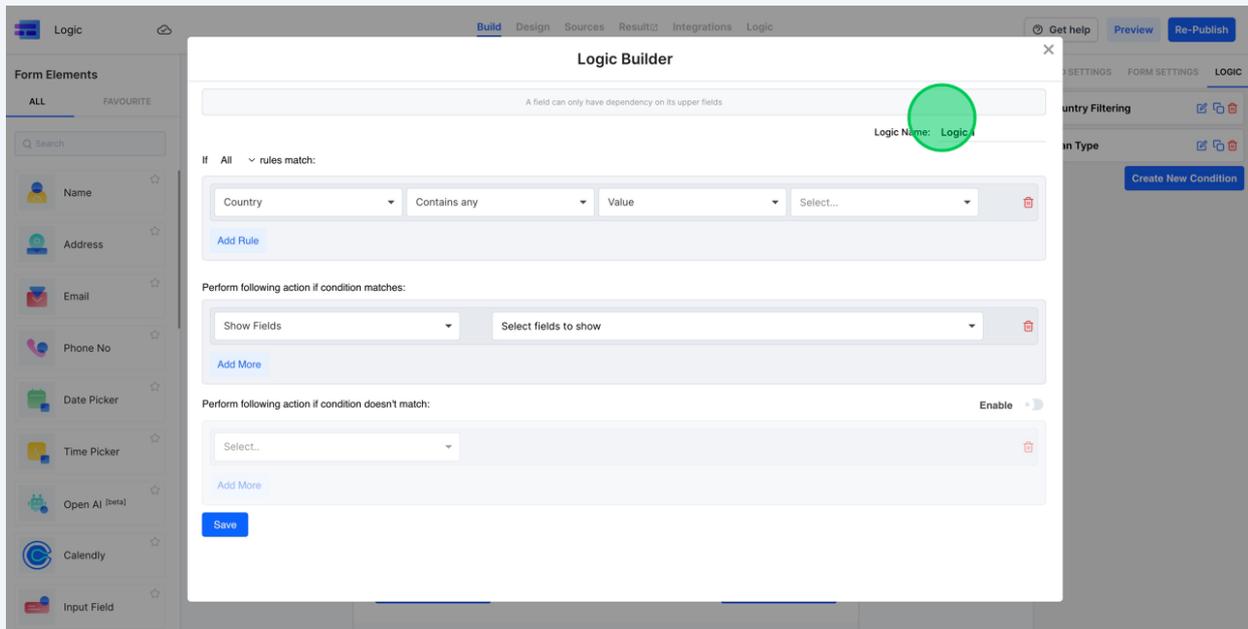
Previous Next

FIELD SETTINGS FORM SETTINGS **Logic**

Country Filtering

Loan Type

Create New Condition



20

Begin by selecting the "Business Revenue in [million \$]" field. To ensure the revenue stays within the range of \$1M - \$5M, we'll configure two conditions:

1. Business Revenue should be less than or equal to \$5M.
2. Business Revenue should be greater than or equal to \$1M.

To make certain that both of these conditions are simultaneously met, choose the "All" option at the top. Selecting "All" means both conditions need to be satisfied. Conversely, if "Any" is chosen, then only one of the conditions needs to be fulfilled.

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

Country Contains any Value Select...

Country  
What kind of loan are you looking for?

Pe Full Name  
Address  
Phone Number  
Email  
Business Name

Pe Business Address match: Enable

Business Revenue in [ million \$ ]  
Select...

Add More

Save

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

Business Revenue in [ million \$ ] Less Than Value

Add Rule

Perform following action if condition matches:

Show Fields Select fields to show

Add More

Perform following action if condition doesn't match: Enable

Select...

Add More

Save

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

Business Revenue in [ million \$ ] Less Than Value

Perform following action if condition matches:

Show Fields

Perform following action if condition doesn't match:

Select...

Save



Logic Builder

Logic Name: Revenue Filtering

If All rules match:

Business Revenue in [ million \$ ] Less Than Or Equal To Value

Perform following action if condition matches:

Show Fields Select fields to show

Perform following action if condition doesn't match:

Select...

Save



Logic Builder

Logic Name: Revenue Filtering

If All rules match:

Business Revenue in [ million \$ ] Less Than Or Equal To Value

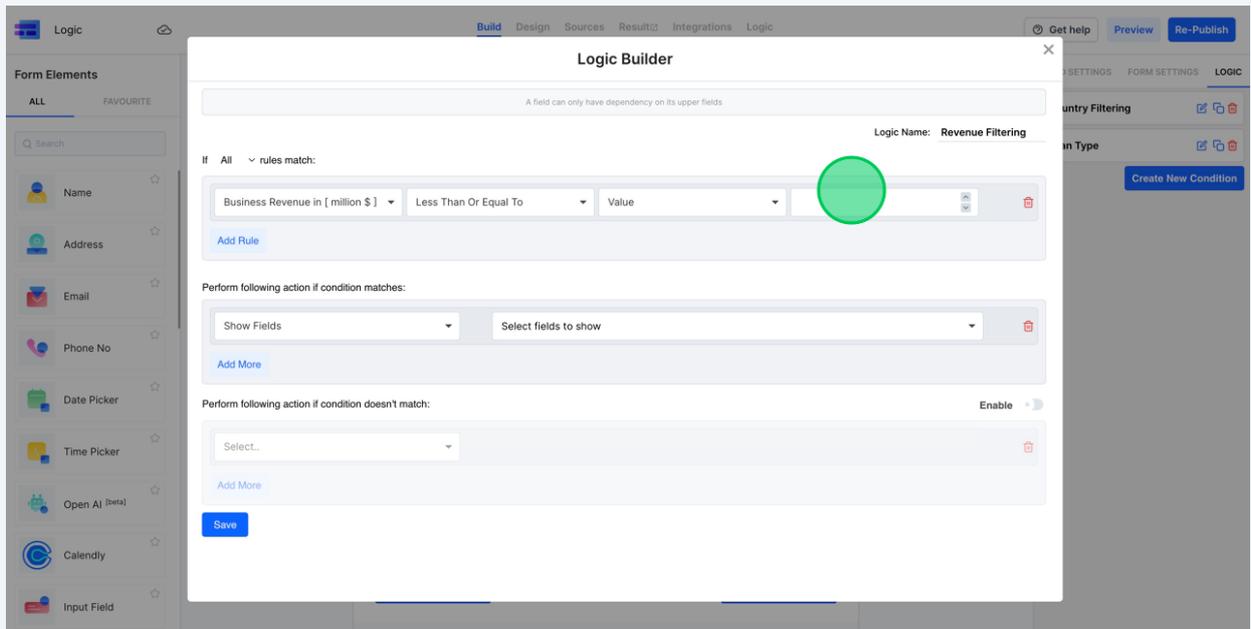
Perform following action if condition matches:

Show Fields Select fields to show

Perform following action if condition doesn't match:

Select.. Enable

Save



Logic Builder

Logic Name: Revenue Filtering

If All rules match:

Business Revenue in [ million \$ ] Less Than Or Equal To Value

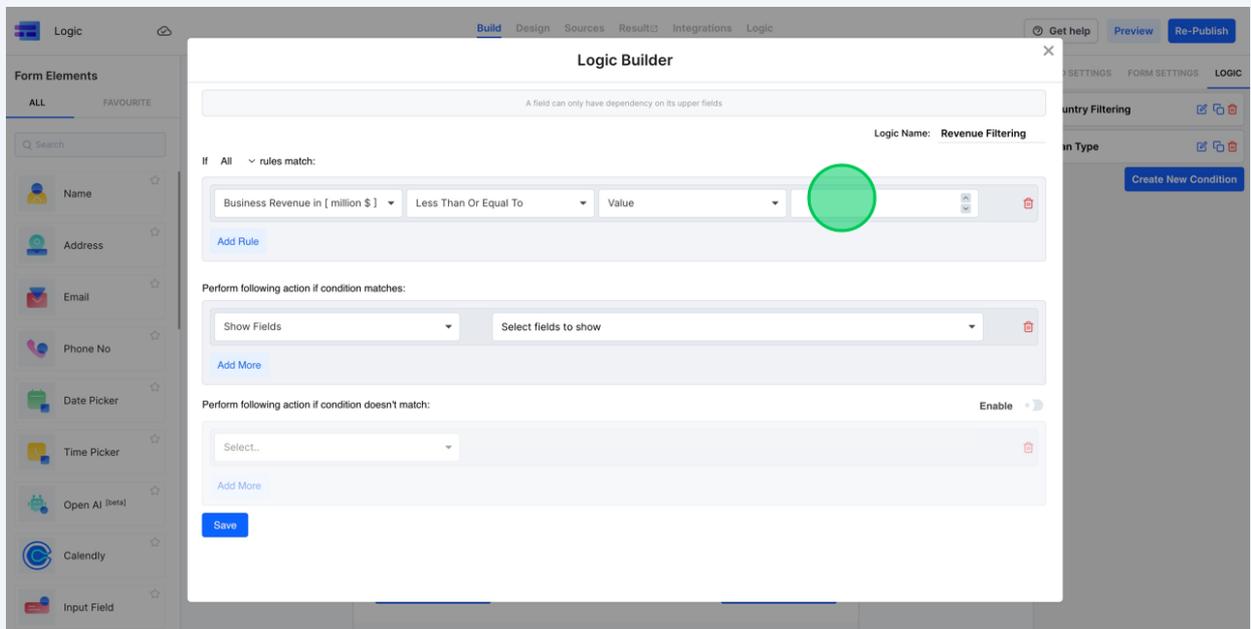
Perform following action if condition matches:

Show Fields Select fields to show

Perform following action if condition doesn't match:

Select.. Enable

Save



Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5

Perform following action if condition matches:

- Show Fields Select fields to show

Perform following action if condition doesn't match:

- Select..

Save

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Country Contains any Value Select..

Perform following action if condition matches:

- Show Fields Select fields to show

Perform following action if condition doesn't match:

- Select..

Save

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Country Contains any Value Select...

Country dropdown menu:

- What kind of loan are you looking for?
- Full Name
- Address
- Phone Number
- Email
- Business Name
- Business Address
- Business Revenue in [ million \$ ]

Save

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Less Than Value

Perform following action if condition matches:

- Show Fields Select fields to show

Perform following action if condition doesn't match:

- Select..

Save

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Less Than Value

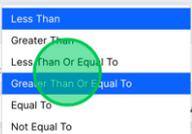
Perform following action if condition matches:

- Show Fields

Perform following action if condition doesn't match:

- Select..

Save



Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value

Perform following action if condition matches:

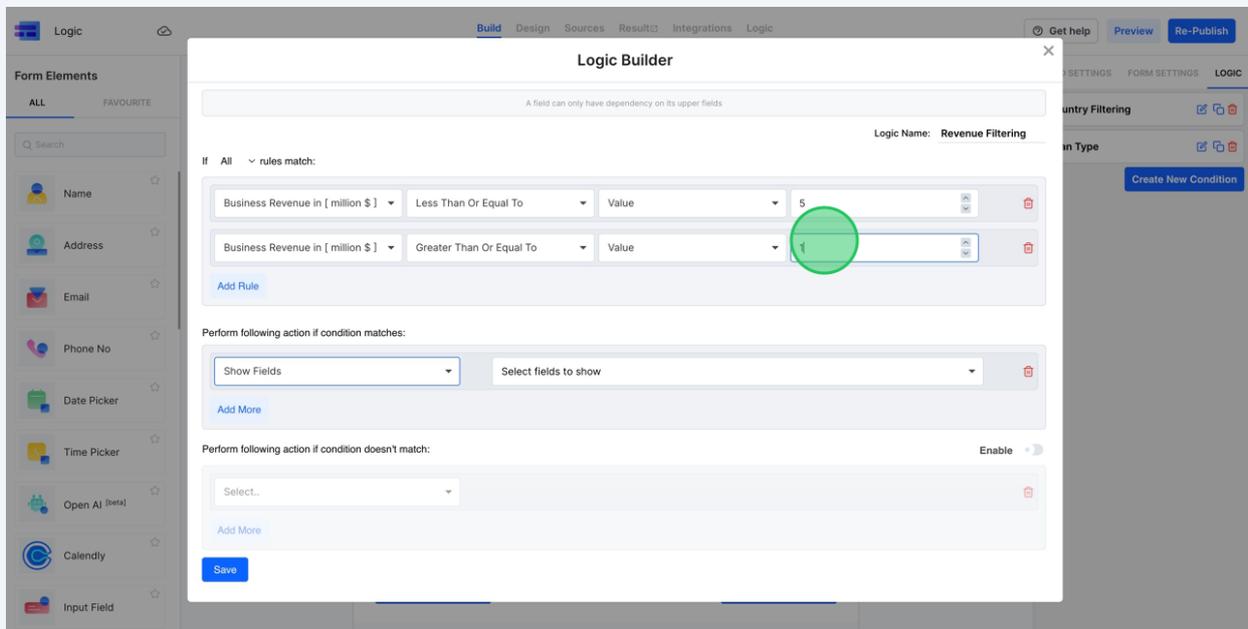
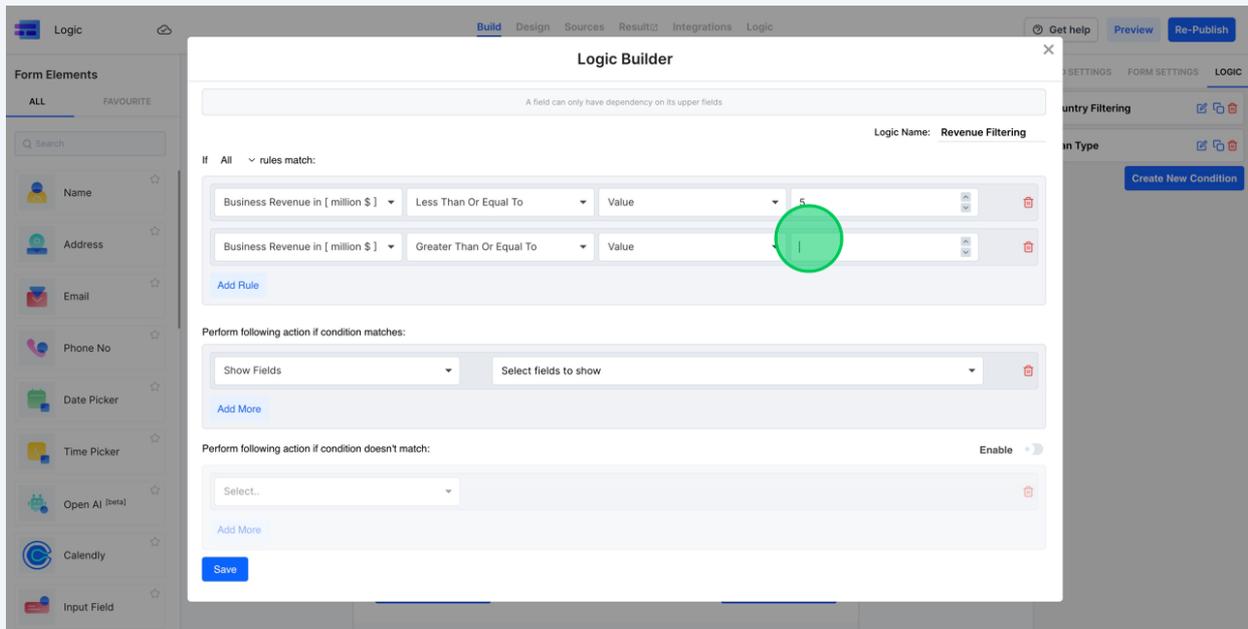
- Show Fields Select fields to show

Perform following action if condition doesn't match:

- Select..

Save





21

When the conditions are met, we aim to hide the text displaying the message about "Revenue". To do this, select the "Hide Fields" option and then pick the specific text element you intend to hide.

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

Perform following action if condition matches:

- Show Fields
- Hide Fields
- Enable Fields
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step
- Change value of

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

Perform following action if condition matches:

- Show Fields
- Hide Fields
- Enable Fields
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step
- Change value of

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

Perform following action if condition matches:

- Show Fields
- Hide Fields
- Enable Fields
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step
- Change value of

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

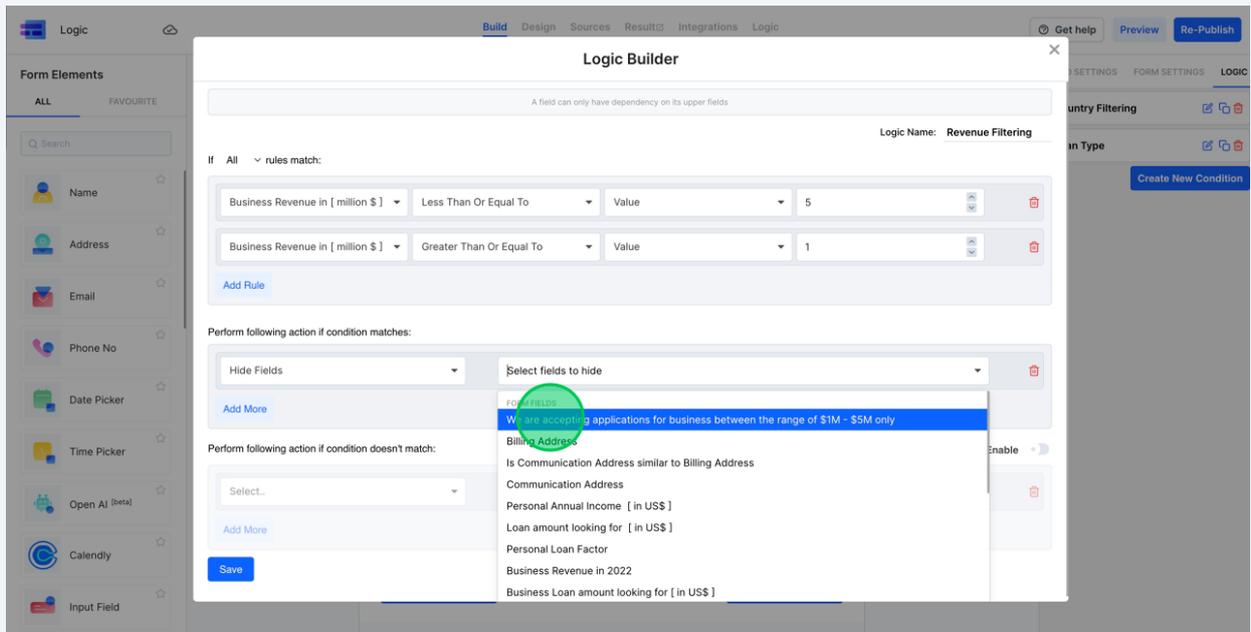
Perform following action if condition matches:

- Hide Fields
- Select fields to hide

Perform following action if condition doesn't match:

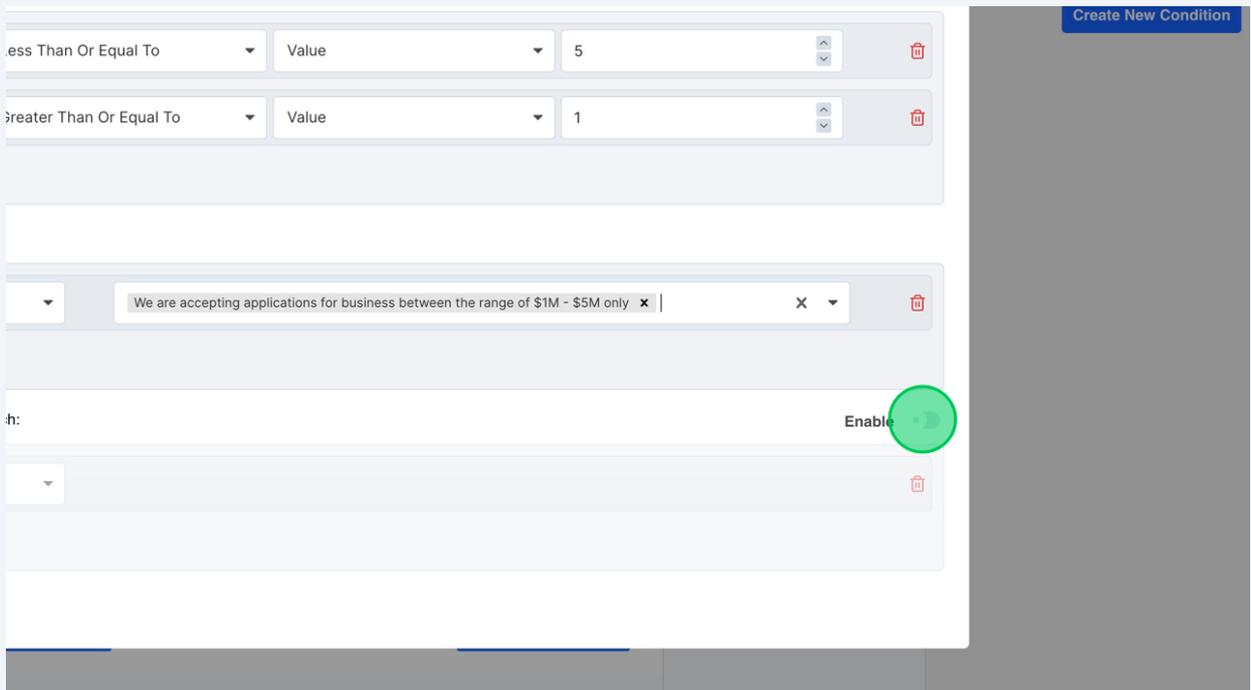
- Select..

Save



22

If the conditions aren't met, we need to take the appropriate actions. These actions will display the message and bypass the relevant steps. Begin by toggling on the "Enable" button in the "condition doesn't match" section.



23

The initial step is to reveal the message. Achieve this by selecting the "Show Fields" option and then choosing the text message field.

Business Revenue in [ million \$ ] Less Than Or Equal To Value 5

Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

Add Rule

Perform following action if condition matches:

Hide Fields We are accepting applications for business between the range of \$1M - \$5M only x

Add More

Perform following action if condition doesn't match:

Show Fields Select fields to show

Add More

Save

### Logic Builder

A field can only have dependency on its upper fields

Logic Name: **Revenue**

If All rules match:

Business Revenue in [ million \$ ] Less Than Or Equal To Value 5

Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

Add Rule

Perform following action if condition matches:

Hide Fields

Add More

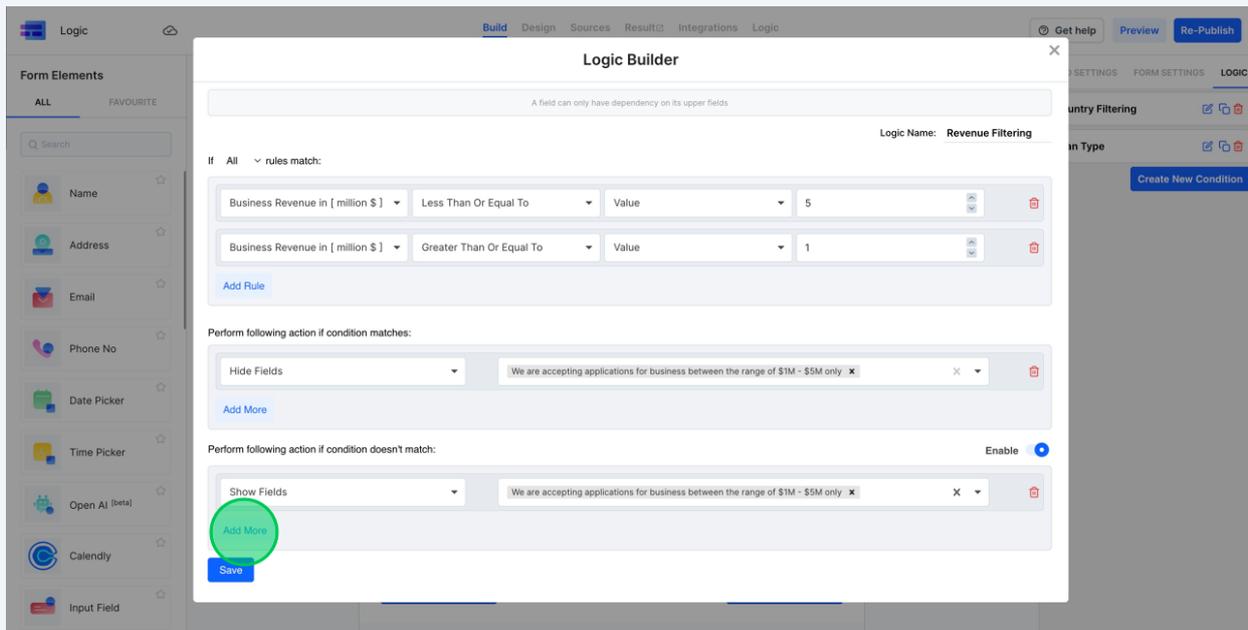
Perform following action if condition doesn't match:

Show Fields Select fields to show

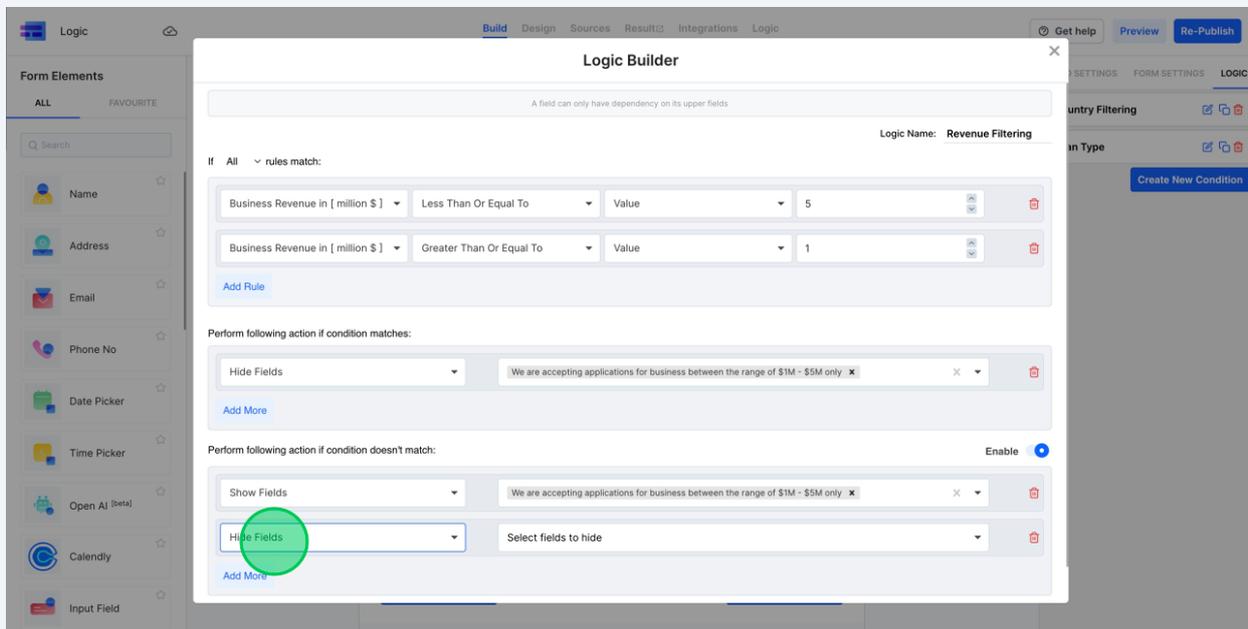
FORM FIELDS

- We are accepting applications for business between the range of \$1M - \$5M only
- Billing Address
- Is Communication Address similar to Billing Address
- Communication Address
- Personal Annual Income [ in US\$ ]
- Loan amount looking for [ in US\$ ]
- Personal Loan Factor
- Business Revenue in 2022
- Business Loan amount looking for [ in US\$ ]

24 To prevent any subsequent steps, simply click on the "Add More" button.



25 Following that, choose the "Skip Steps" option. From there, pick all the steps you'd like to bypass.



Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

Perform following action if condition matches:

- Enable Fields: We are accepting applications for business between the range of \$1M - \$5M only
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step (highlighted)
- Change value in
- Hide Fields: Select fields to hide

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

Perform following action if condition matches:

- Hide Fields: We are accepting applications for business between the range of \$1M - \$5M only

Perform following action if condition doesn't match:

- Show Fields: We are accepting applications for business between the range of \$1M - \$5M only
- Skip Step: Select steps to skip

Save

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

Perform following action if condition matches:

- Hide Fields We are accepting applications for business between the range of \$1M - \$5M only

Perform following action if condition doesn't match:

- Show Fields We are accepting applications for business between the range of \$1M - \$5M only
- Skip Step Select steps to skip
  - Address
  - Personal Loan Details
  - Business Loan Details**
  - Business Loan Application Status

Save

Logic Builder

Logic Name: Revenue Filtering

If All rules match:

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

Perform following action if condition matches:

- Hide Fields We are accepting applications for business between the range of \$1M - \$5M only

Perform following action if condition doesn't match:

- Show Fields We are accepting applications for business between the range of \$1M - \$5M only
- Skip Step Business Loan Details
  - Address
  - Personal Loan Details
  - Business Loan Application Status
  - Personal Loan Application Status

Save

Logic Builder interface showing a logic rule named "Revenue Filtering".

**Logic Name:** Revenue Filtering

**Rules:**

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

**Perform following action if condition matches:**

- Hide Fields: We are accepting applications for business between the range of \$1M - \$5M only

**Perform following action if condition doesn't match:** Enable

- Show Fields: We are accepting applications for business between the range of \$1M - \$5M only
- Skip Step: Business Loan Details

**Available Fields:**

- Address
- Personal Loan Details
- Business Loan Application Status** (highlighted with a green circle)
- Personal Loan Application Status

**Form Elements Panel:** Name, Address, Email, Phone No, Date Picker, Time Picker, Open AI (beta), Calendly, Input Field.

Logic Builder interface showing a logic rule named "Revenue Filtering".

**Logic Name:** Revenue Filtering

**Rules:**

- Business Revenue in [ million \$ ] Less Than Or Equal To Value 5
- Business Revenue in [ million \$ ] Greater Than Or Equal To Value 1

**Perform following action if condition matches:**

- Hide Fields: We are accepting applications for business between the range of \$1M - \$5M only

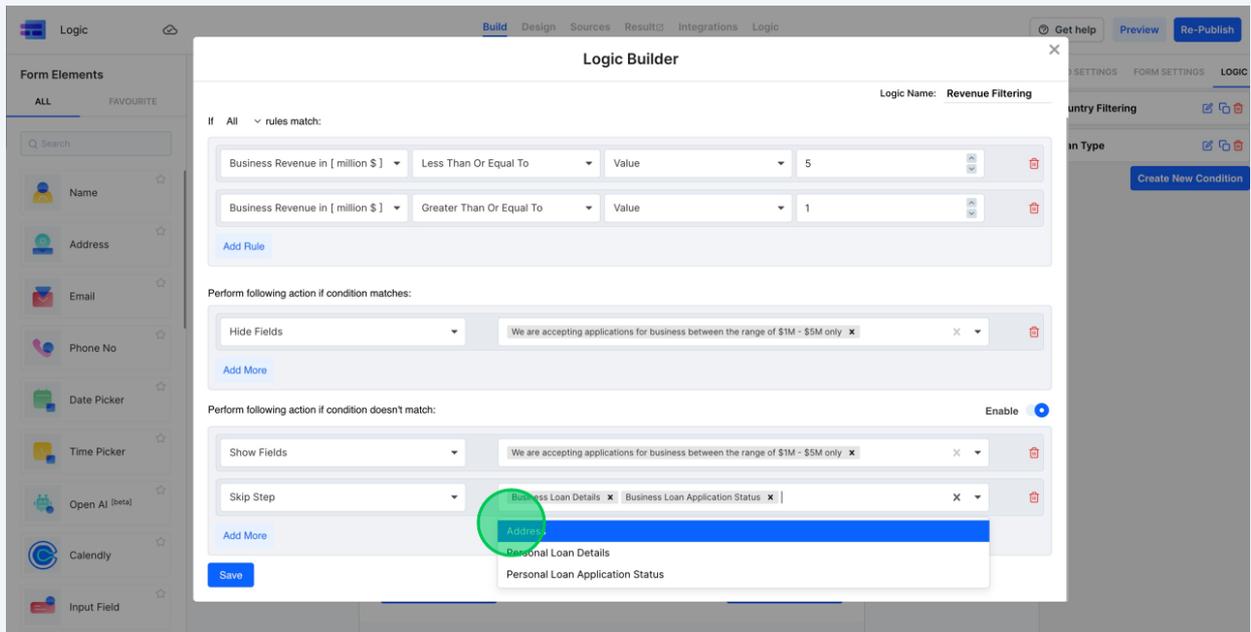
**Perform following action if condition doesn't match:** Enable

- Show Fields: We are accepting applications for business between the range of \$1M - \$5M only
- Skip Step: Business Loan Details | Business Loan Application Status (highlighted with a green circle)

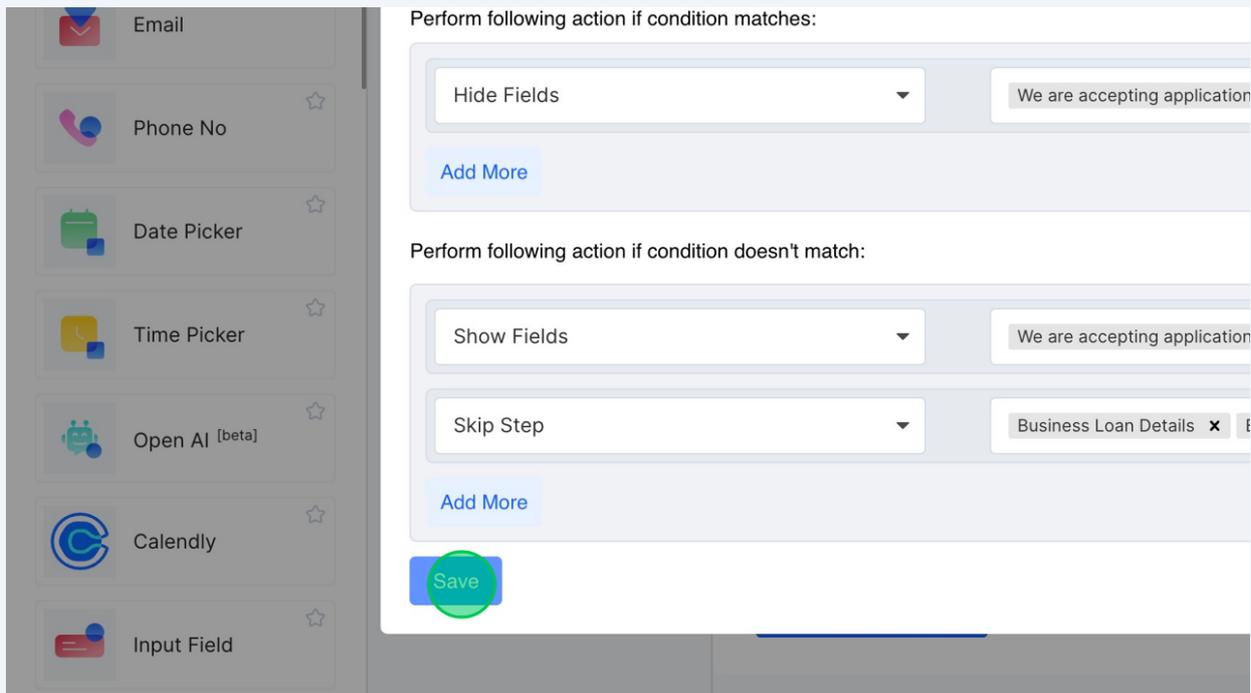
**Available Fields:**

- Address
- Personal Loan Details
- Business Loan Application Status
- Personal Loan Application Status

**Form Elements Panel:** Name, Address, Email, Phone No, Date Picker, Time Picker, Open AI (beta), Calendly, Input Field.

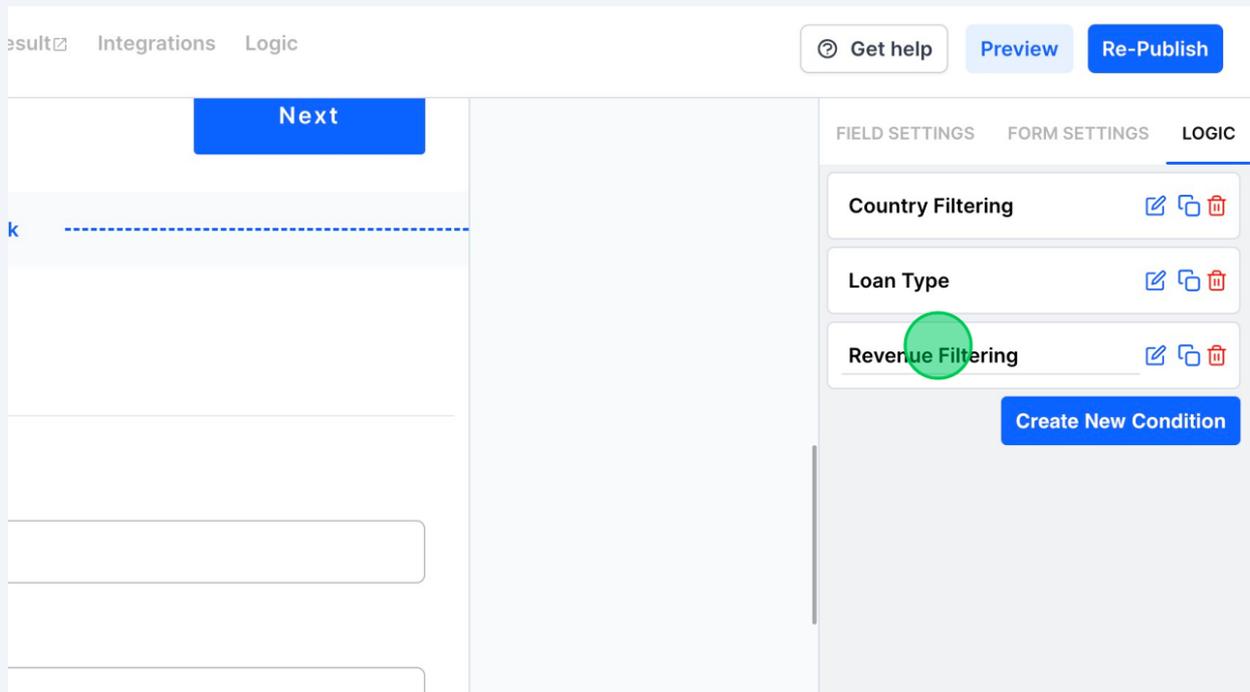


26 Conclusively, press the "Save" button to store this condition.



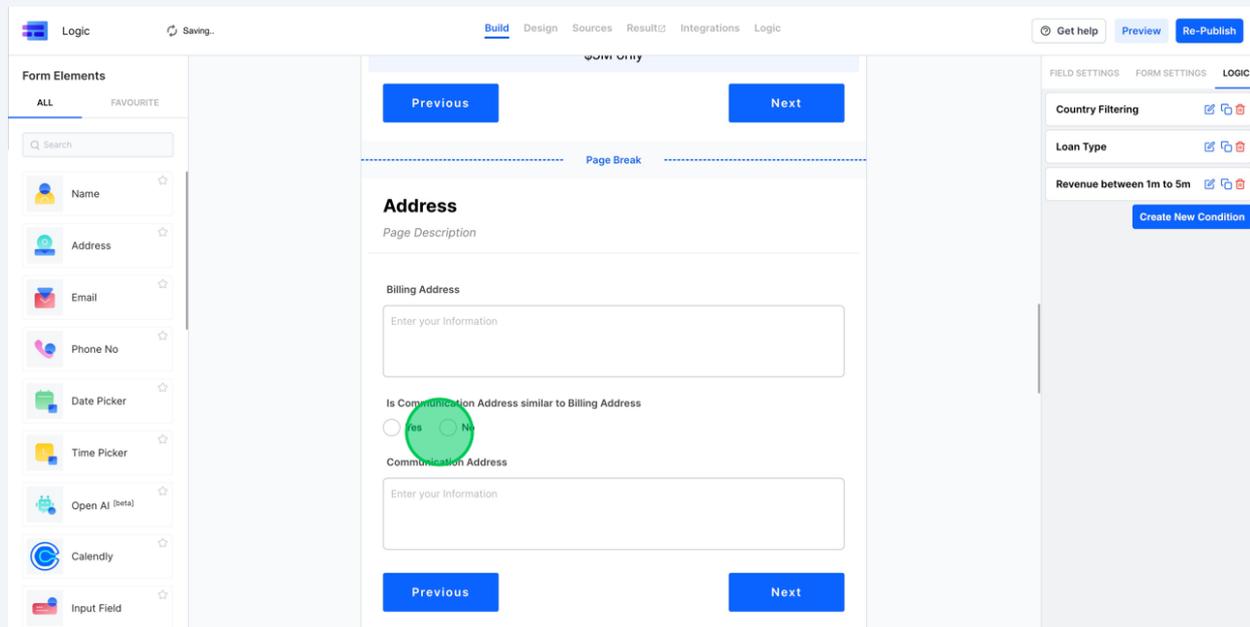
27

You should now observe the newly added "Revenue Filtering" logic. If needed, you can also edit the name of this logic. Simply click on it and type in your desired text.



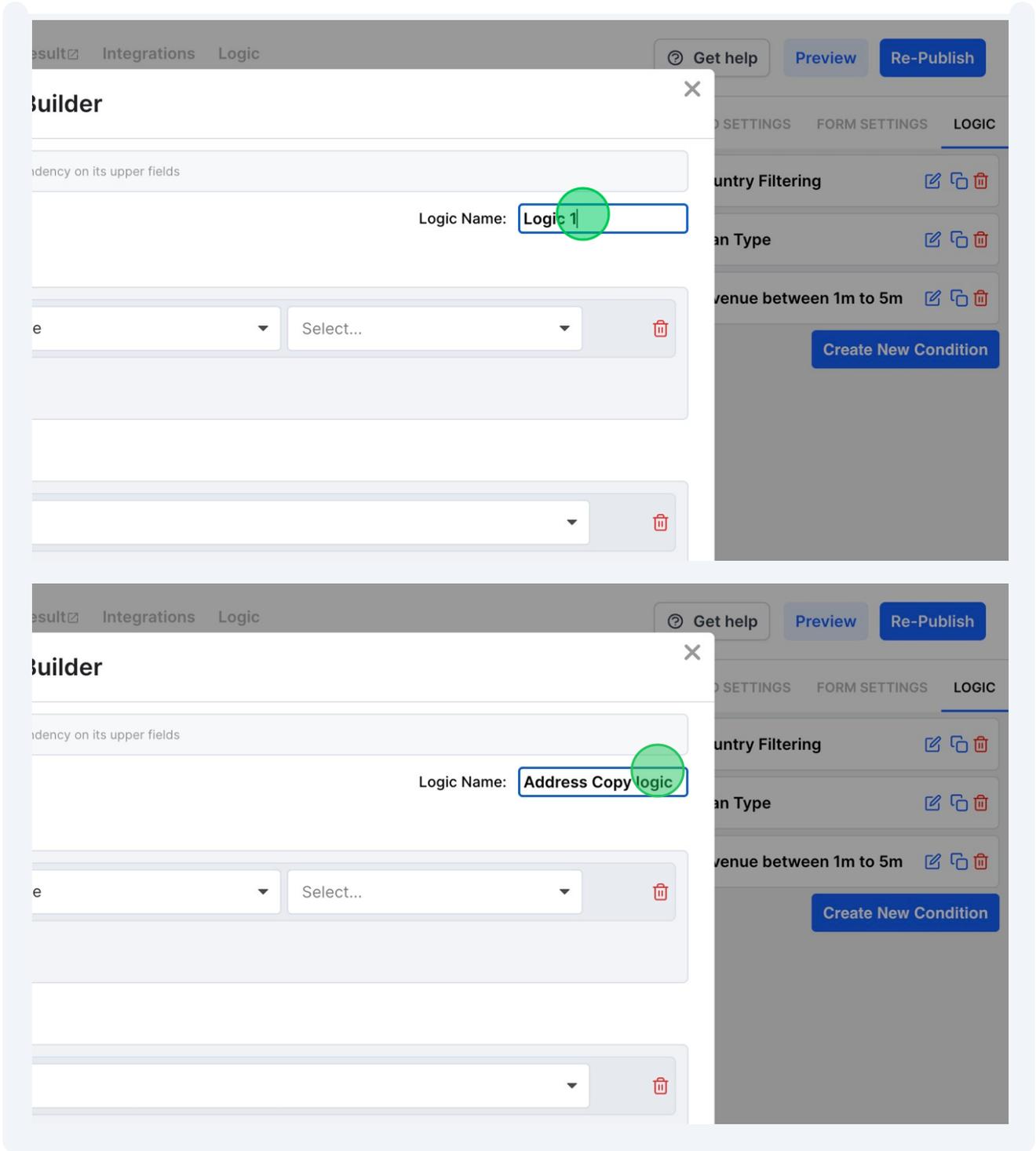
28

To adjust the value of the communication address to match the billing address when the user indicates that they're the same, follow these steps. Navigate to the logic section and initiate the creation of a new condition.



29

Assign the name "Address Copy Logic" to this new logic condition.



30

To set the condition, choose the "Is Communication Address similar to Billing Address" field and compare its value to "Yes". Use the "contains any" operator for this comparison.

Logic Builder

Logic Name: Address Copy logic

If All rules match:

- Country Contains any Value Select...
- Phone Number
- Email
- Business Name
- Business Address
- Business Revenue in [ million \$ ]
- Billing Address Select fields to show
- Is Communication Address similar to Billing Address
- Communication Address
- Personal Annual Income [ in US\$ ] match: Enable
- Loan amount looking for [ in US\$ ] Select...

Save

Logic Builder

Logic Name: Address Copy logic

If All rules match:

- Is Communication Address similar to Billing Address Contains any Value Select...

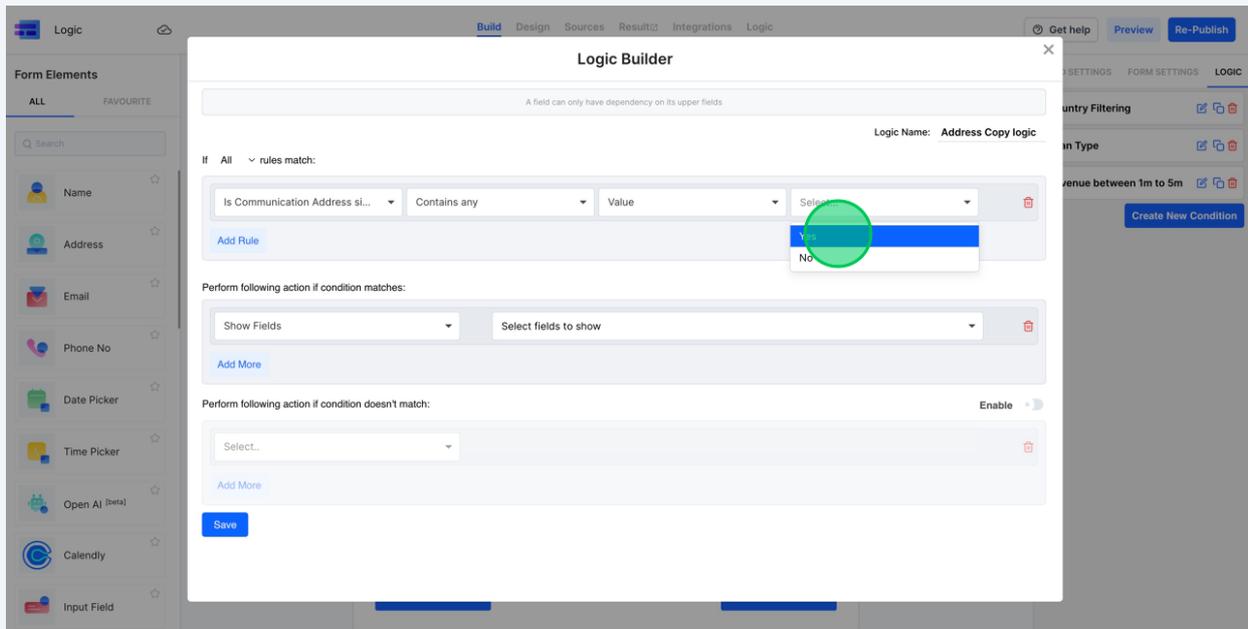
Perform following action if condition matches:

- Show Fields Select fields to show

Perform following action if condition doesn't match:

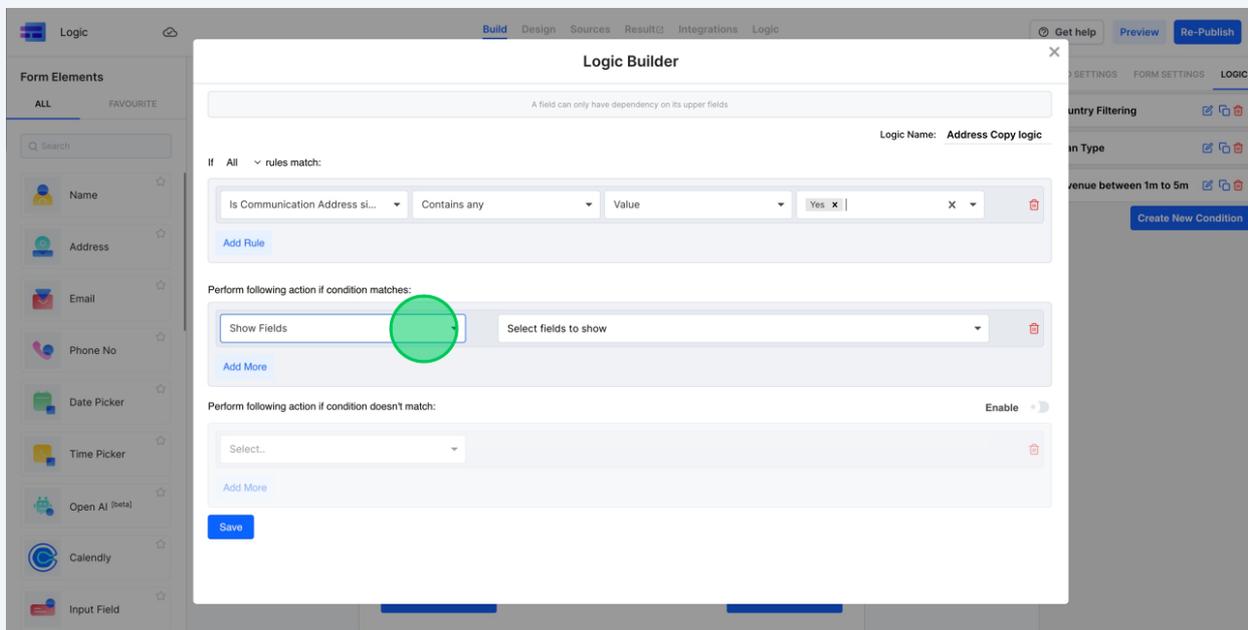
- Select...

Save



**31** When the user selects "Yes", perform the following two actions:

1. Copy the value from the "Billing Address" field to the "Communication Address" field.
2. Disable the "Communication Address" field to prevent the user from making further changes.



**32** To setup the first action:

1. Click on the "Change Value" option.

2. Choose the "Communication Address" field.

3. Specify that its new value should be taken from the "Billing Address" field.

The screenshot shows a configuration interface for a form. On the left, there is a sidebar with various field types: Email, Phone No, Date Picker, Time Picker, Open AI [beta], Calendly, and Input Field. The main area displays a configuration for a rule. At the top, it says "Perform following action if condition matches:". Below this, there is a dropdown menu currently set to "Show Fields". A dropdown menu is open, listing several actions: Hide Fields, Enable Fields, Disable Fields, Make Fields Require, Make Fields Un-Require, URL to redirect after submit, Skip Step, and Change value of. The "Change value of" option is highlighted in blue, and a green circle is drawn around it. To the right of the dropdown menu, there is a text input field labeled "Select fields to show".

All rules match:

is Communication Address si... Contains any Value Yes x

Add Rule

Perform following action if condition matches:

Change value of Select..

Add More

Perform following action if condition doesn't match:

Select..

Add More

s Communication Address si...    Contains any    Value    Yes ✕

id Rule

rm following action if condition matches:

Change value of    Select..

id More

rm following action if condition doesn't match:

Select..

id More

ve

Communication Address

Personal Annual Income [ in US\$ ]

Loan amount looking for [ in US\$ ]

Personal Loan Factor

Business Revenue in 2022

Business Loan amount looking for [ in US\$ ]

Business Loan Factor

### 33 To set the "Communication Address" value to that of the "Billing Address":

1. Under the "Change Value" option where you've selected the "Communication Address" field, look for the "Value" dropdown.
2. From the dropdown, select "Compare with Another Field".
3. A new field option will appear. Click on it and a dropdown list of available fields will be displayed.
4. From this list, choose "Billing Address". This will ensure that the value of "Communication Address" will be set to whatever is in the "Billing Address" field.

The image shows a configuration interface with a list of rules. The second rule is highlighted with a green circle around its 'Value' dropdown. A blue tooltip is visible over the 'Value' dropdown of the fourth rule, containing the text 'Value Compare with Another Field'.

venue between 11  
Cre

Value

Yes x

Value

Value

Enable

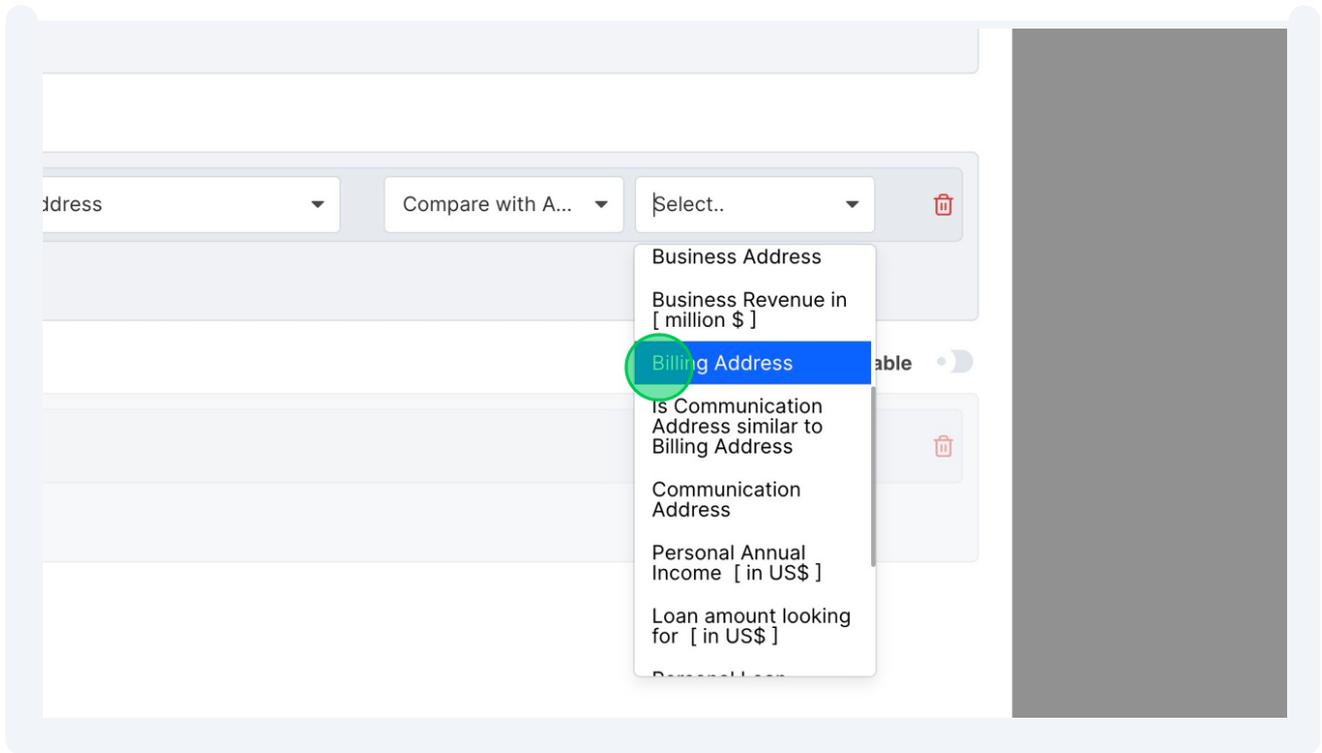
Communication Address

Value

Value

Value Compare with Another Field

Enable



### 34 To disable the "Communication Address" field:

1. After setting the value of the "Communication Address" to that of the "Billing Address", click on the "Add More" button.
2. From the dropdown of available actions, select "Disable Field".
3. Once you've selected the "Disable Field" action, a new dropdown list will appear showcasing the available fields.
4. From this list, select "Communication Address". This action will ensure that once the user selects "Yes" for the field "Is Communication Address similar to Billing Address", the "Communication Address" field will be disabled, preventing the user from making any further changes to it.

Address ☆

Email ☆

Phone No ☆

Date Picker ☆

Time Picker ☆

Open AI [beta] ☆

Is Communication Address si... Contains any Val

Add Rule

Perform following action if condition matches:

Change value of Communication Address

Add More

Perform following action if condition doesn't match:

Select..

Add More

Save

Address ☆

Email ☆

Phone No ☆

Date Picker ☆

Time Picker ☆

Open AI [beta] ☆

Add Rule

Perform following action if condition matches:

Change value of Communication Address

Show Fields Select fields to show

Add More

Perform following action if condition doesn't match:

Select..

Add More

Perform following action if condition matches:

Change value of

Show Fields

Pe **Disable Fields**

- Hide Fields
- Enable Fields
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step
- Change value of

Save

le

lowing action if condition matches:

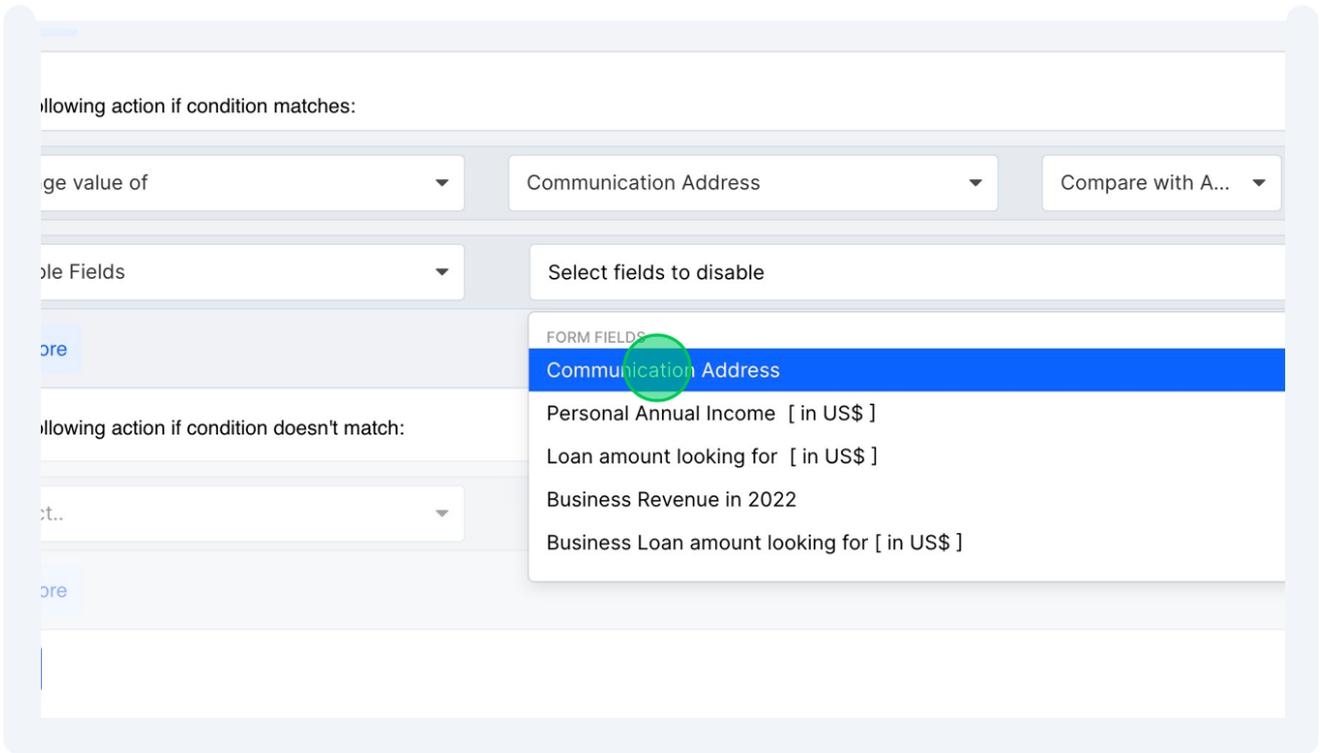
ge value of

le Fields

re

lowing action if condition doesn't match:

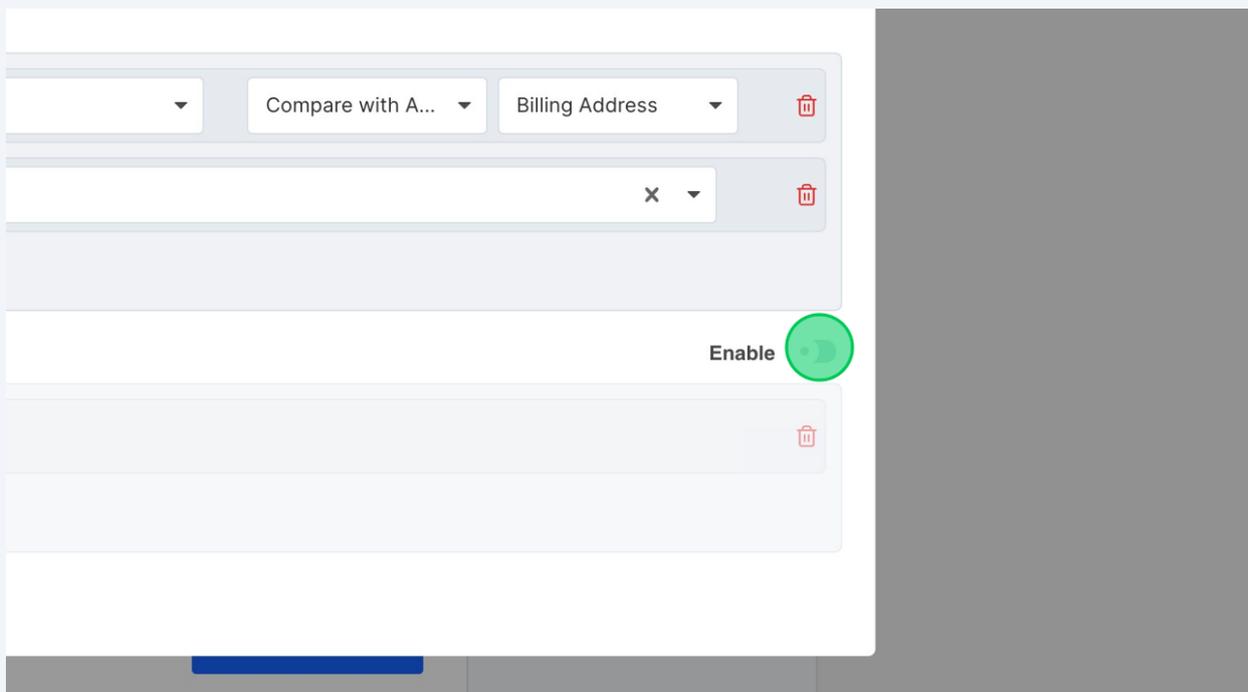
re



35

To allow for a different "Communication Address" than the Business Address, follow these steps:

1. Activate the "condition doesn't match" section.
2. Choose the "Enable Field" action.
3. Select the "Communication Address" field.



Perform following action if condition matches:

Change value of ▼ Communication Address ▼

Disable Fields ▼ Communication Address ×

[Add More](#)

Perform following action if condition doesn't match:

Show Fields ▼ Select fields to show

[Add More](#)

[Save](#)

Perform following action if condition matches:

Is Communication Address si... ▼ Contains any ▼ Value

[Add Rule](#)

Perform following action if condition matches:

- Hide Fields
- Enable Fields**
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step
- Change value of

Communication Address

Communication Address ×

Show Fields ▼ Select fields to show

g action if condition matches.

ue of  Compare with A...

lds

g action if condition doesn't match:

ds

munication Address si...  Value

wing action if condition matches:

e value of  Compare with A...

- Fields
- FORM FIELDS
  - Communication Address**
  - Personal Annual Income [ in US\$ ]
  - Loan amount looking for [ in US\$ ]
  - Business Revenue in 2022
  - Business Loan amount looking for [ in US\$ ]

wing action if condition doesn't match:

Fields

**36** Press the "Save" button to store this configuration.

Perform following action if condition matches:

- Change value of ▼ Communication Address
- Disable Fields ▼ Communication Address ×

Add More

Perform following action if condition doesn't match:

- Enable Fields ▼ Communication Address ×

Add More

Save

**37** We've now successfully configured four logics. Next, let's proceed to establish the last two logics, which will determine eligibility for both personal and business loan applications.

Country Filtering ✎ 📄 🗑️

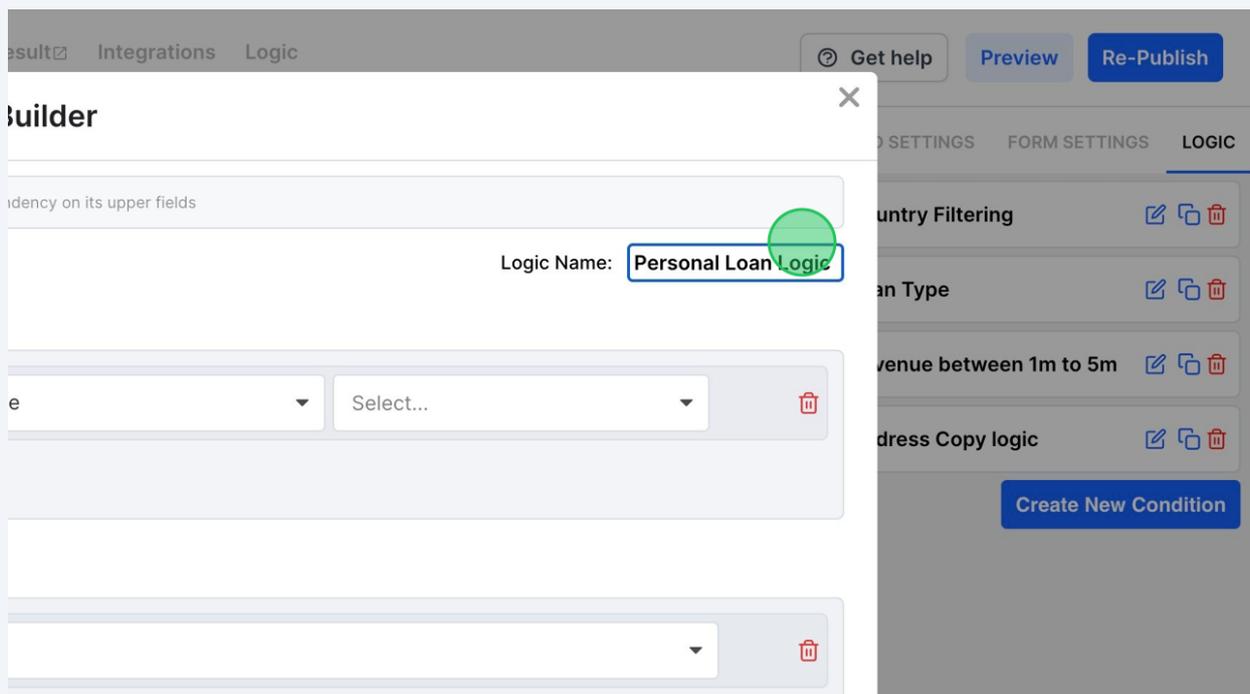
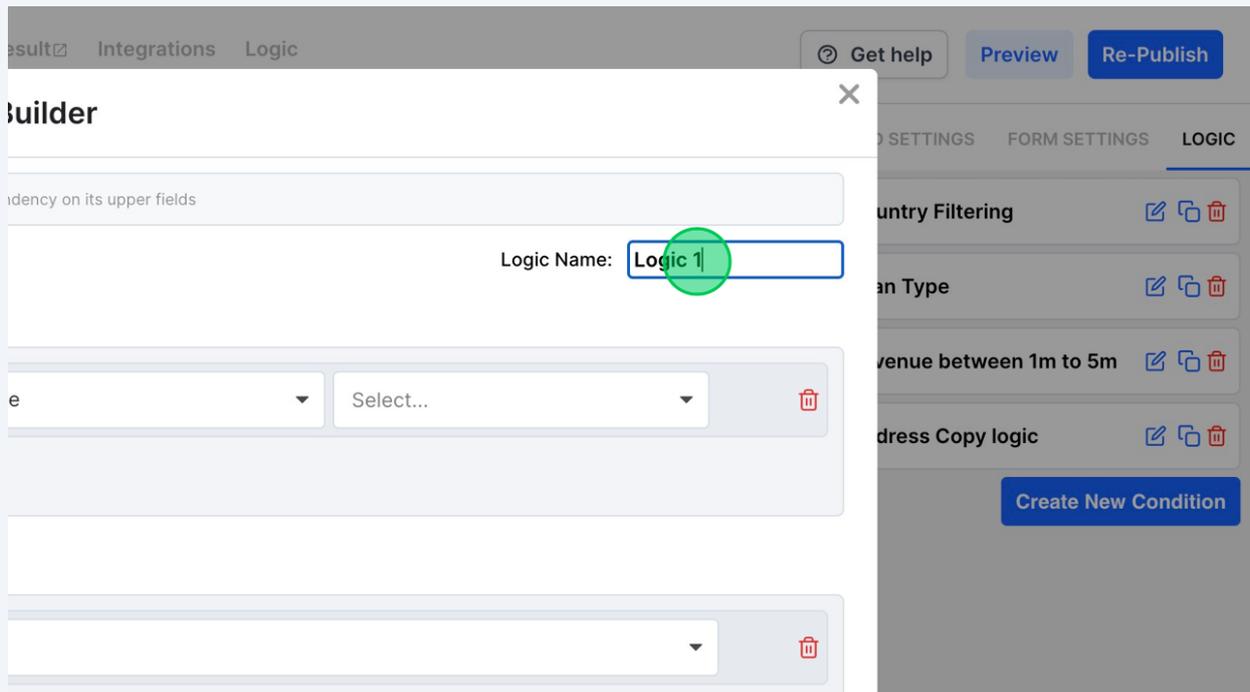
Loan Type ✎ 📄 🗑️

Revenue between 1m to 5m ✎ 📄 🗑️

Address Copy logic ✎ 📄 🗑️

Create New Condition

**38** Assign the name "Personal Loan Logic" to this configuration.



**39** To enforce the logic for the personal loan application:

1. Ensure that the application can only be submitted if the "Personal Loan Factor" is below 30.
2. In the condition settings, choose the "Personal Loan Factor" field.

3. Apply the "Less Than" operator and set the value to 30.

Country Contains any Value

Billing Address  
Is Communication Address similar to Billing Address

Communication Address

Personal Annual Income [ in US\$ ]

Loan amount looking for [ in US\$ ]

**Personal Loan Factor**

Business Revenue in 2022

Business Loan amount looking for [ in US\$ ]

Business Loan Factor

Select..

Add More

Select fields to show

Design Sources Results Integrations Logic

Get help Prev

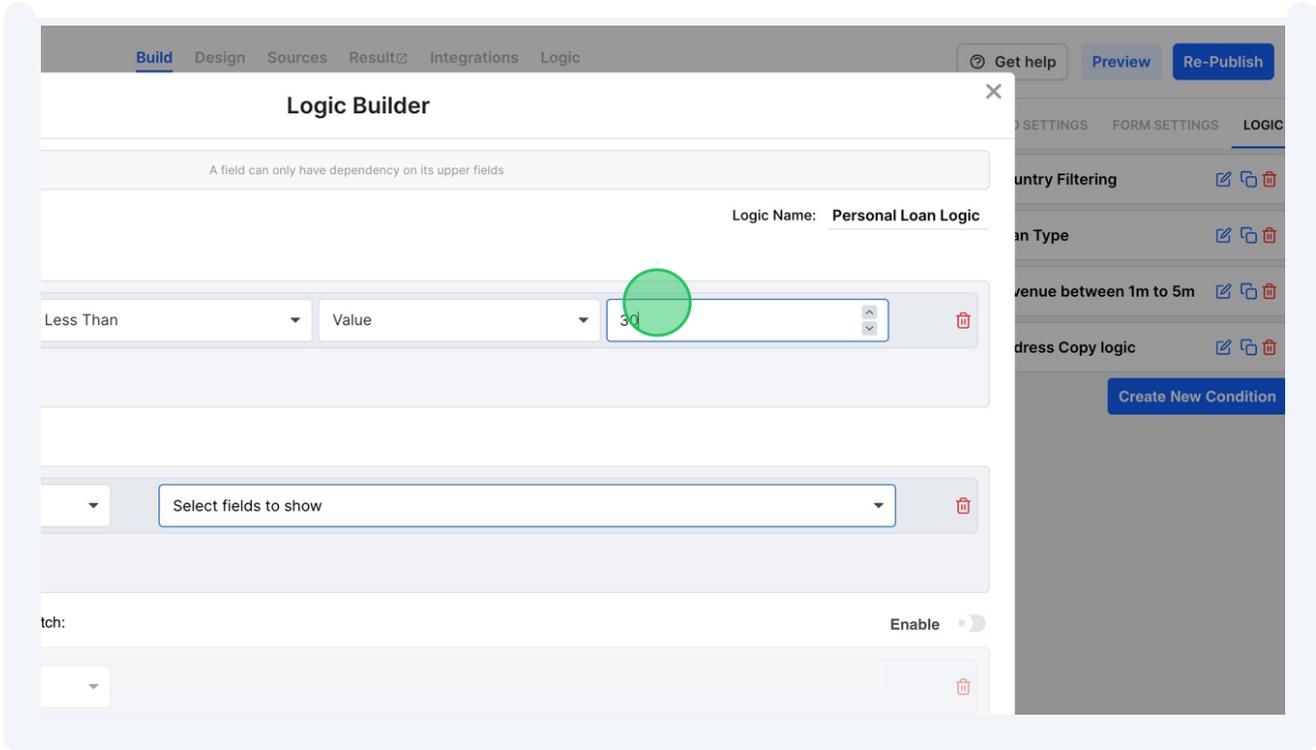
### Logic Builder

A field can only have dependency on its upper fields

Logic Name: Personal Loan Logic

Value

Select fields to show

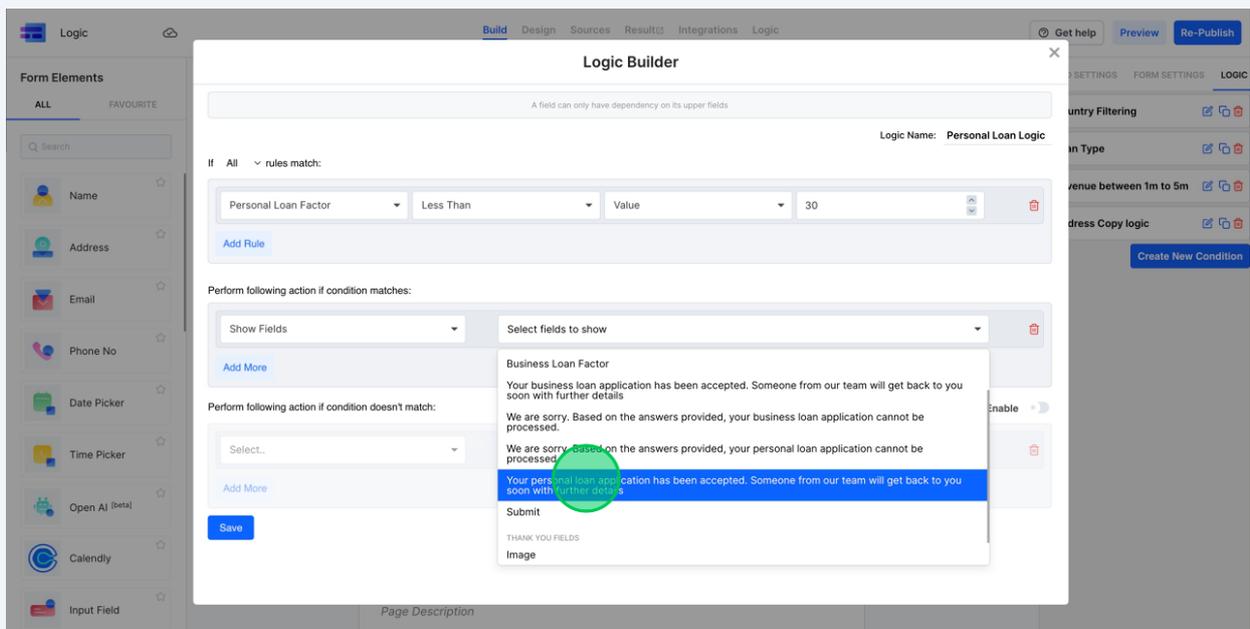


40

To display the appropriate messages based on the condition (i.e., "Personal Loan Factor" is less than 30):

- Use the "Show Fields" action to display the success message.
- Simultaneously, use the "Hide Fields" action to conceal the failure message.

Remember, this process is similar to the actions we've taken earlier in this tutorial.



Logic Builder

Logic Name: Personal Loan Logic

If All rules match:

Personal Loan Factor Less Than Value 30

Perform following action if condition matches:

Show Fields Your personal loan application has been accepted. Someone from our team will get back to you so...

Perform following action if condition doesn't match:

Select..

Save

Logic Builder

Logic Name: Personal Loan Logic

If All rules match:

Personal Loan Factor Less Than Value 30

Perform following action if condition matches:

Show Fields Your personal loan application has been accepted. Someone from our team will get back to you so...

Hide Fields Select fields to hide

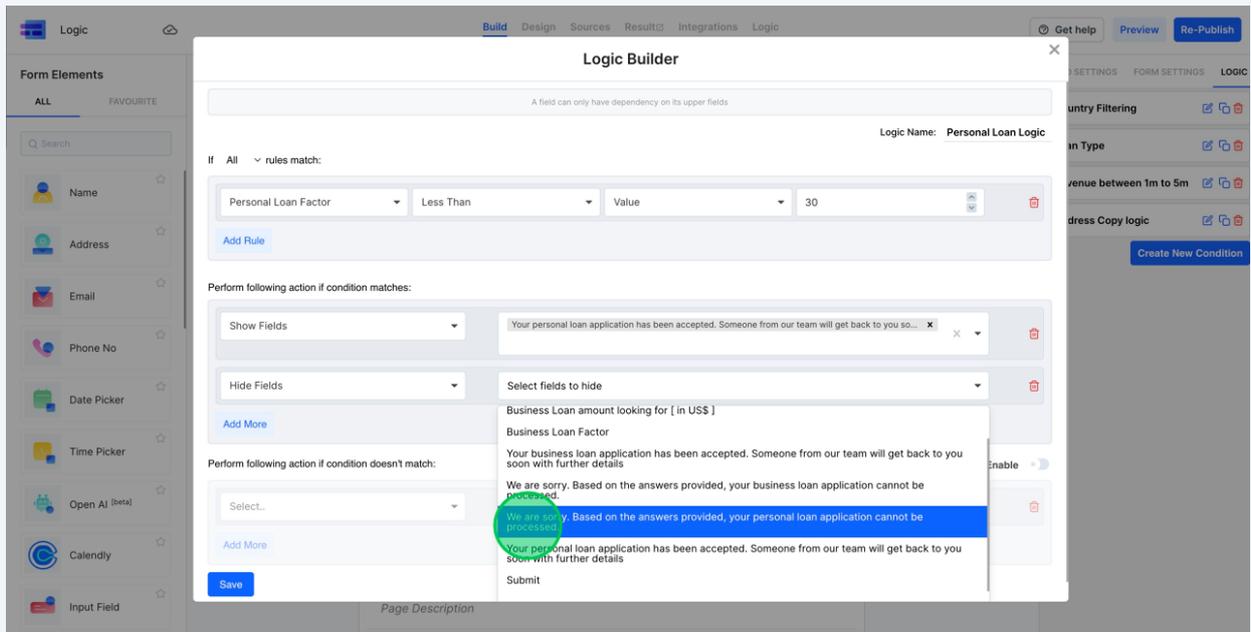
Perform following action if condition doesn't match:

Select..

Save

FORM FIELDS

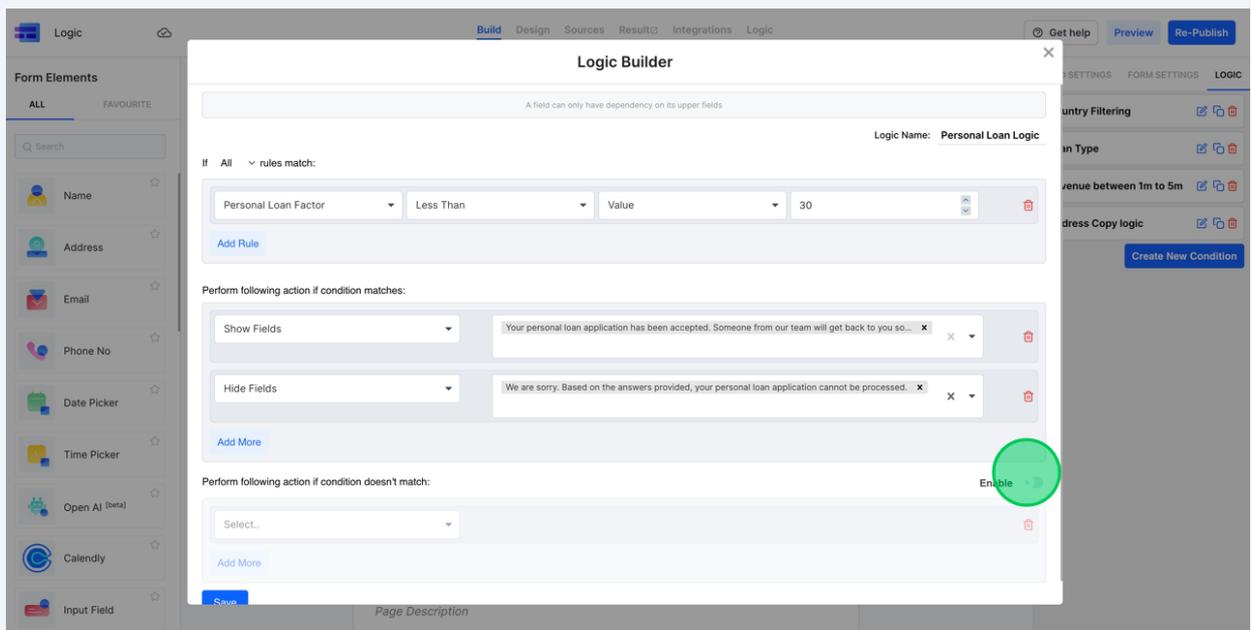
- Business Revenue in 2022
- Business Loan amount looking for [ in US\$ ]
- Business Loan Factor
- Your business loan application has been accepted. Someone from our team will get back to you soon with further details
- We are sorry. Based on the answers provided, your business loan application cannot be processed.
- We are sorry. Based on the answers provided, your personal loan application cannot be processed.
- Your personal loan application has been accepted. Someone from our team will get back to you



## 41 For scenarios where the condition isn't met:

1. Activate the "Condition doesn't match" section.
2. Use the "Hide Fields" action to conceal the Success Message.
3. Simultaneously, use the "Show Fields" action to display the Failure Message.

This ensures that users receive the correct feedback based on their "Personal Loan Factor" input.



- Email
- Phone No
- Date Picker
- Time Picker
- Open AI [beta]
- Calendly
- Input Field

- Hide Fields
- Enable Fields
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step
- Change value of

Your personal loan application has been acc

We are sorry. Based on the answers provid

Show Fields

Add More

Save

Select fields to show

Page Description

- Hide Fields
- Enable Fields
- Disable Fields
- Make Fields Require
- Make Fields Un-Require
- URL to redirect after submit
- Skip Step
- Change value of

Your personal loan application has been accepted. Someone from our team will get bac

We are sorry. Based on the answers provided, your personal loan application cannot be

Show Fields

Select fields to show

More

Page Description

Perform following action if condition matches:

Show Fields

Show Fields

lore

Perform following action if condition doesn't match:

Show Fields

FORM FIELDS

Business Revenue in 2022

Business Loan amount looking for [ in US\$ ]

Business Loan Factor

Your business loan application has been accepted. Someone from our team will contact you soon with further details

We are sorry. Based on the answers provided, your business loan application has not been processed.

We are sorry. Based on the answers provided, your personal loan application has not been processed.

Your personal loan application has been accepted. Someone from our team will contact you soon with further details

Select fields to show

lore



- Email
- Phone No
- Date Picker
- Time Picker
- Open AI [beta]
- Calendly
- Input Field

Show Fields

Your personal loan application

Hide Fields

We are sorry. Based on the a

Add More

Perform following action if condition doesn't match:

Show Fields

We are sorry. Based on the a

Add More

Save

Page Description

-  Email
-  Phone No ☆
-  Date Picker ☆
-  Time Picker ☆
-  Open AI [beta] ☆
-  Calendly ☆
-  Input Field ☆

Show Fields ▼

Your personal loan applicatio

Hide Fields ▼

We are sorry. Based on the a

Add More

Perform following action if condition doesn't match:

Show Fields ▼

We are sorry. Based on the a

Add More

Save

Page Description

ds ▼

Your personal loan application has been accepted. Someone from our team will get back to you

s ▼

We are sorry. Based on the answers provided, your personal loan application cannot be process

g action if condition doesn't match:

ds ▼

We are sorry. Based on the answers provided, your personal loan application cannot be process

s ▼

Select fields to hide

Page Description

ids

Your personal loan application has been accepted. Someone from our team will get back to you

FORM FIELDS

Business Revenue in 2022

Business Loan amount looking for [ in US\$ ]

Business Loan Factor

Your business loan application has been accepted. Someone from our team will get back to you soon with further details

ing action if condition doesn't match:

We are sorry. Based on the answers provided, your business loan application cannot be processed.

We are sorry. Based on the answers provided, your personal loan application cannot be processed.

ids

Your personal loan application has been accepted. Someone from our team will get back to you soon with further details

ids

Select fields to hide

Page Description

ids

Your personal loan application has been accepted. Someone from our team will get back to you

Business Loan amount looking for [ in US\$ ]

Business Loan Factor

Your business loan application has been accepted. Someone from our team will get back to you soon with further details

We are sorry. Based on the answers provided, your business loan application cannot be processed.

We are sorry. Based on the answers provided, your personal loan application cannot be processed.

ing action if condition doesn't match:

Your personal loan application has been accepted. Someone from our team will get back to you soon with further details

ids

Submit

THANK YOU FIELDS

Image

ids

Select fields to hide

Page Description

42 Click on the blue "Save" button to finalize and save this logic configuration.

Hide Fields

We are sorry. Based on the a

Add More

Perform following action if condition doesn't match:

Show Fields

We are sorry. Based on the a

Hide Fields

Your personal loan applicatio

Add More

Save

Page Description

43 Great! Now that the "Personal Loan Logic" is visible in our list of logics, you can follow a similar procedure to configure the logic for the "Business Loan". Since the process mirrors the one for the Personal Loan Logic, we won't delve into the details again. With these steps completed, all the desired logics have been successfully set up.

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nation

Loan Type

Revenue between 1m to 5m

Address Copy logic

Personal Loan Logic

Create New Condition