

EMPOWERED

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Building GOapply Opportunities with the Simple Form Builder

Presented by

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akoyago

Building GOapply Opportunities with the Simple Form Builder

Understand the difference between Simple Form Builder and Advanced Form Builder.

Learn how to efficiently create and customize GOapply opportunities using Simple Form Builder.

Explore how to streamline your set up and optimize forms for ease of use.

Enhancements

Simple Form Builder

Makes building
GOapply forms *faster*

Streamlines form
creation and eliminates
manual mapping

New feature! Coming in
the August 2025
Release

Simple Form Builder

- **No Mapping!**
 - All questions mapped to fields on REQUEST available by default
- **Panels for related tables (Constituent and Contact only) available by default**
- **Blank form will open** – will no longer include pre-mapped dynamic panels by default
- Will be the **default option for any new forms** created after August 2025 release
- **Offers ability to change to Advanced Form Builder**

Build questions for GOapply Users (mapped and unmapped)

Accounts for properties of the field in CRM (i.e. character limit, option set values)

Advanced Form Builder

- Requires you to *map questions manually*
- *Allows for mapping to related tables other than Constituent and Contact*
- *Opens with all possible pre-mapped panels included* (requiring you to delete panels you don't want)
- Will be the default option for *Third Party Responses, Review Form, and Scholarship Forms (for now)*
- *Does not offer ability to change to Simple Form Builder (can't switch back!)*

Simple Form Builder

Effective August 28, 2025:

- All new forms and phases will open in Simple Form Builder
- Forms created before August 28 (or copied from older forms) will continue to open in Advanced Form Builder
- Forms cannot be converted back from Advanced to Simple once changed
- Use Simple whenever possible; convert to Advanced only when required

Why Use Simple Form Builder?

Simple Form Builder offers key functionality:

- Clarity and Organization within Navigation Bars
- Review and Build Logic in one area
- Enhanced visibility of Pages
- Mapped Questions
 - Enhanced Search Features
 - Organized Locations
- File Upload Fields
- Ease of Use with Expand/Collapse All
- Validation with Power Apps each time the Form is Entered

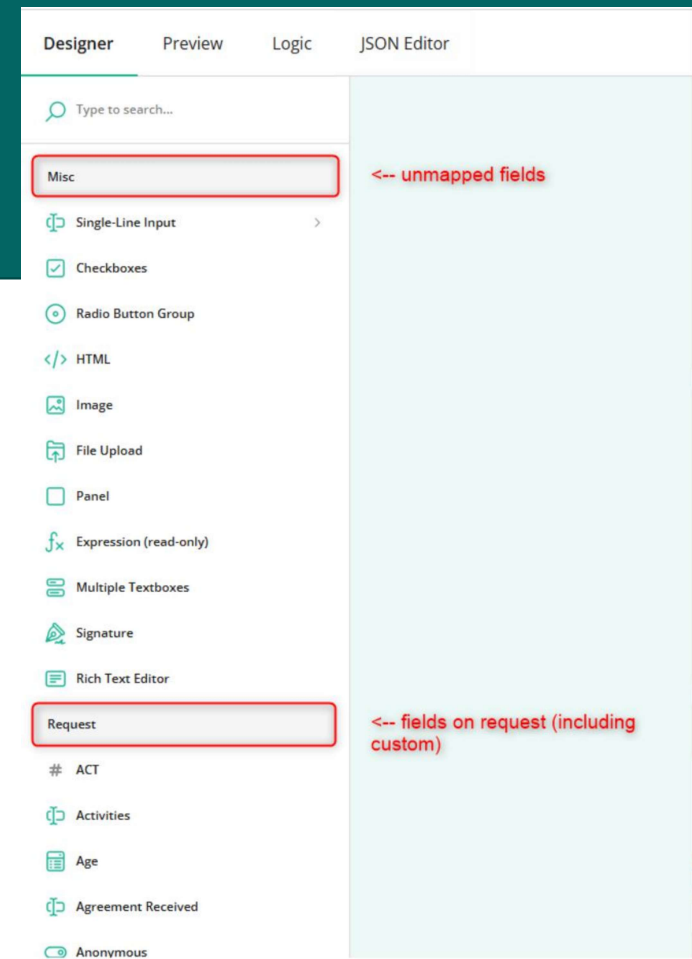
Toolbox Questions

Unmapped Questions (Top Section):

- Use for essay-type responses, yes/no questions, and conditional logic
- Not mapped to akoyaGO – purely for internal form logic

Mapped Questions (Bottom Section):

- Displays all searchable fields from your Request form
- Drag and drop to add – no manual mapping required
- Supports fields on the Constituent and Contact forms if Lookup fields exist on the Request



Simple Form Builder

Simple Form Builder supports fields from the following tables:

- Request (default)
- Constituent
- Contact

Out-of-the-Box Lookup Fields Include:

- Applicant → Constituent
- Primary Contact → Contact
- College → Constituent
- High School → Constituent

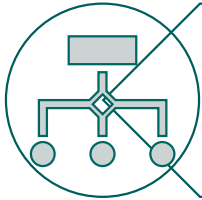
Best Practice

To map to additional tables (e.g., Payments, Requirements), use Advanced Form Builder. Make sure to add all necessary fields **before** converting to Advanced— you cannot revert to Simple after converting.

When to Convert to Advanced Form Builder



Mapping to **custom lookup fields** for any entity other than **Constituent** or **Contact**



Mapping to **child records** of the Request



Forms requiring **payment/report logic**

Form Building Best Practices

Organize forms using pages and headers

Set Name and Title

Add Descriptions where necessary

Use Properties to define correct data type and format

Utilize **Read Only** questions for static data

Only use the "Required" toggle for questions that must be answered

Regularly **"Save"** your Form

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Key Takeaways

Use Simple Form Builder for any new phases tied to Request, Contact, or Constituent

Only convert to Advanced if you need mapping to other tables or report/payment phases

Drag and drop fields with no manual mapping required

Simple and Advanced forms can be used together across phases in a single opportunity

Documentation and form builder guides will be available in the GOsupport

THANK YOU

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