

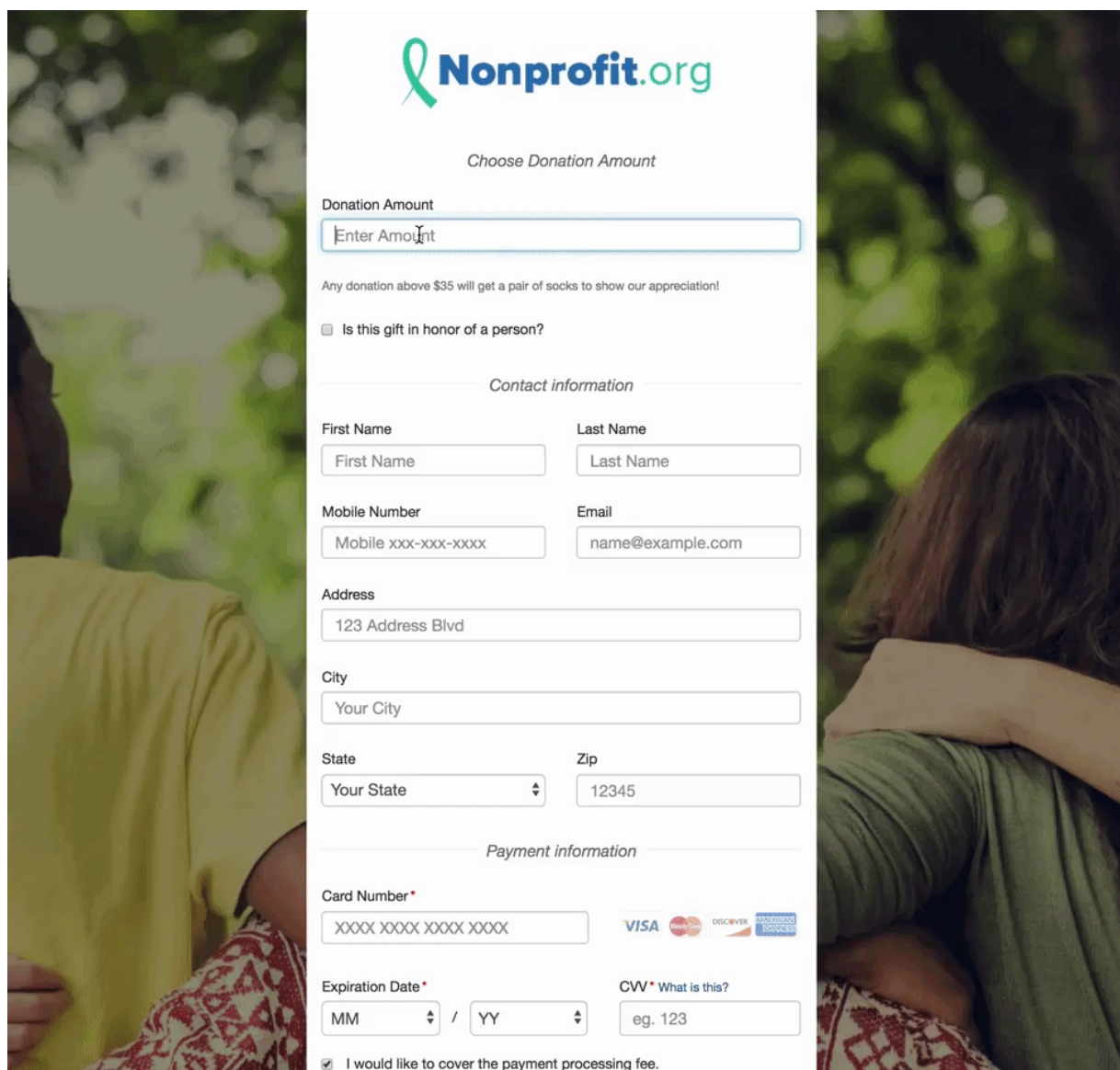
Dynamic Actions

Last Modified on 06/02/2022 2:42 pm PDT

Dynamic Actions enable conditional logic to GiveSmart Fundraise forms, providing you many more options when setting them up. Dynamic Actions show fields or elements based on the user's selections. This gives you greater power to build forms that reveal additional data and information that are only needed if the user completes a previous field to trigger it.

GiveSmart Fundraise supports conditional fields; fields that are hidden from the user's view by default. Once triggered by a selected answer, the conditional field is then visible on the form. With this functionality, you can build in virtually any conditional option relying on your supporters' choices.

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The image shows a donation form for Nonprofit.org. The form is titled "Choose Donation Amount" and includes several sections:

- Donation Amount:** A text input field with the placeholder "Enter Amount".
- Message:** "Any donation above \$35 will get a pair of socks to show our appreciation!"
- Checkbox:** "Is this gift in honor of a person?" (unchecked).
- Contact information:**
 - First Name:** Input field with placeholder "First Name".
 - Last Name:** Input field with placeholder "Last Name".
 - Mobile Number:** Input field with placeholder "Mobile xxx-xxx-xxxx".
 - Email:** Input field with placeholder "name@example.com".
 - Address:** Input field with placeholder "123 Address Blvd".
 - City:** Input field with placeholder "Your City".
 - State:** Dropdown menu with placeholder "Your State".
 - Zip:** Input field with placeholder "12345".
- Payment information:**
 - Card Number:** Input field with placeholder "XXXX XXXX XXXX XXXX".
 - Expiration Date:** Two dropdown menus for "MM" and "YY" with a slash separator.
 - CWV:** Input field with placeholder "eg. 123".
 - Logos:** Logos for VISA, MasterCard, Discover, and American Express.
- Footer:** A checkbox labeled "I would like to cover the payment processing fee." (checked).

Dynamic actions are created by using one of the elements that allow a choice, then adding all the elements. Then choose which elements will appear with one of the dynamic action choices.

The types of elements that can activate a dynamic action include:

- [Checkbox](#)
- [Drop-Down](#)
- [Item](#)
- [Calculated](#)

These are indicated by the action items to the right of the element after you have saved it into your form:



Creating a Dynamic Action

Add a separate Section if desired. Otherwise, open the section within your form where you want to place the form elements. For more information on adding sections, [click here](#).

Add the appropriate Form Element. For more information on Form Elements, [click here](#).

A screenshot of a form editor interface. The form is divided into sections: 'Suggested Amounts', 'In Honor Of', 'Recurring Donations', and 'Contact Information'. The 'In Honor Of' section is active, showing a 'Section Heading' label and a text input field containing 'In Honor Of'. A trash icon is visible to the right of the heading. A blue button labeled '+ Add Form Element' is open, showing a dropdown menu with the following options: 'Collect Information', 'Agree to Terms' (with a document icon), 'Calculated' (with a calendar icon), 'Checkbox' (with a checked checkbox icon and a mouse cursor), and 'Date' (with a calendar icon).

Add Form Element - Checkbox



Display Label

Is this gift in honor of a person?

Reporting Label

Honor

Default Status

Unchecked

Cancel

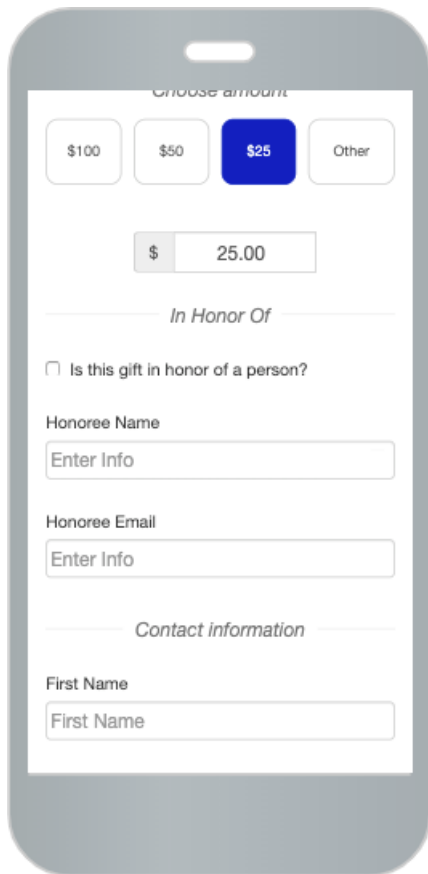
Save

Add the Form Elements that will only appear when the choice from the Dynamic action is selected.

Honor	Checkbox	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/>	
Honoree Name	Short Answer	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/>	
Honoree Email	Short Answer	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/>	

[+ Add Form Element](#)

When you have everything ready, all the elements will initially be visible on your form. Now it is time to Show/Hide specific elements with Dynamic Actions in the main element (in this example, the Checkbox).



Click on the Dynamic Action icon in the element with the choice.

Show Required

Setup Dynamic Action - Calculated ×

Make your online forms dynamic by showing elements based on user responses.

When Honor

..... is show

[+ Add new value](#)

It will show the Reporting Label as the variable. Click on the Select Value pulldown and choose the option you want. *For example, Checked.*

Setup Dynamic Action - Calculated



Make your online forms dynamic by showing elements based on user responses.

When Honor

..... is **Select value** **show**

Checked

Unchecked

Select which elements to be visible only if that value is true. *For example, show the Honoree's name and email only when the Honor Checkbox is checked.*

Setup Dynamic Action - Calculated



Make your online forms dynamic by showing elements based on user responses.

When Honor

..... is **show**

Add new value

In Honor Of

Honoree Name

Honoree Email

Elements

Terms

Reset Action

Cancel














Save

If you want to have different elements show for different choices (values), you can click **Add new value**. If the Dynamic Element has multiple choices, you can add up to those number of choices.

If you need to start over, you can click **Reset Action**.

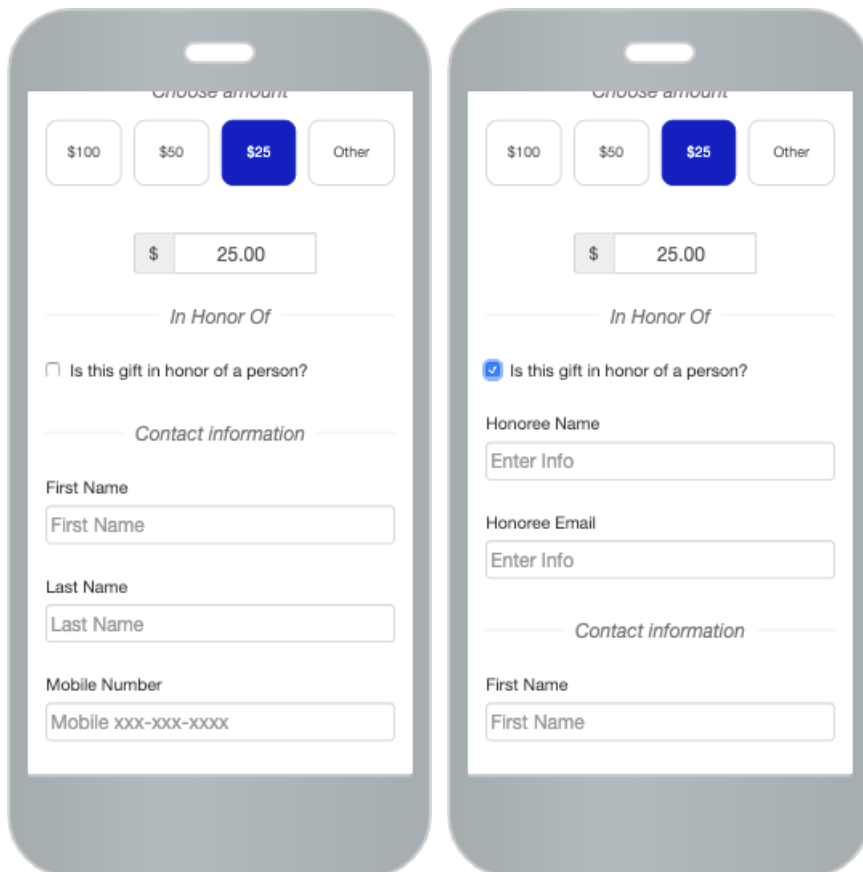
When everything is ready, click **Save**.

The elements that are included in a Dynamic Action will now be noted in your form design.

Honor Sets: 2 Elements	Checkbox Dynamic	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/> Required     
Honoree Name Set by: 'Is this gift in honor of a person?'	Short Answer Dynamic	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/> Required    
Honoree Email Set by: 'Is this gift in honor of a person?'	Short Answer Dynamic	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/> Required    

[+ Add Form Element](#)

Your form will now hide those elements until the conditions of the dynamic element are matched.



For a more complete example design of using the checkbox dynamic action, [click here](#).

For an example design of using the Drop-down dynamic action, [click here](#).