

Forms activity



By the end of this activity, you will be able to:

- Create a form
- Use conditional logic in your form



Follow these steps to get the course activity assets

1. Go to the Get the Course Activity Assets lesson on the left
2. Click the appropriate link for your region
3. Open the following sheet: 02_Gather Data and Report Course Assets > 06_Forms Activity > 06_Marketing Request Tracker - Forms

Create a form

In the interactive lesson you created a form for other departments to fill out. In this activity, you'll create a form for your team to fill out. Sometimes, requests come directly to your team members. They might be smaller projects or projects that are started through a hallway conversation or in a meeting. Your team needs their own form to input information into your request tracker. Create a form with the below information. You can start the new form from scratch or duplicate the existing form in the sheet.

Form Title	Marketing Request Tracker - Team Submission
Fields to remove	Remove the following fields from your form: Requestor Name
Add new fields	<p>Add this new field (column) to your form and sheet:</p> <p>Name: Employee Entered Field Type: Checkbox Default Value: checked Hidden field: Yes</p>
Field Order	<p>Arrange your form fields in this order:</p> <ol style="list-style-type: none"> 1. Employee Entered 2. Urgent 3. Status 4. Request Description 5. Requestor E-mail 6. Department 7. Budget

	8. Actual Budget 9. % Complete 10. Date Needed By 11. Date Started 12. Estimated Completion Date
% Complete	The default value of this field should be zero.
Conditional Logic	<p>You want different fields to show for the user based on the status field. Setup these three conditional logic rules:</p> <p>Rule 1: If the Status is In Progress then show Actual Budget and % Complete</p> <p>Rule 2: If the Status is Closed then show Budget</p> <p>Rule 3: If the Status is Requested then show Date Needed By</p>

Test your form and make sure the conditional logic rules are working. Submit a few responses and check your sheet to make sure data is being collected accurately through this form.

Great job! You reached the end of the activity!