Logical Workflow

Logical Workflow plugin is basically a Workflow plugin that can be triggered by certain criteria. This plugin is used to pass data from one form/survey to another based on a Logical Condition and also launch the second form/survey after the first one is submitted.

To set up the Logical Workflow between two forms, proceed with the following settings:

- Create an Email Alert of 'To Respondent' or 'To another person' type to send an email with the link to the target form/survey after the first response is submitted.
- When composing the email alert, insert [LINK_TO_ANOTHER_SURVEY] tag. If the plugin is set up properly, the email alert will be sent upon submit and the tag will be automatically replaced with the link to the second form/survey.
- The original form/survey should contain an <EMAIL_REPLY/> tag to capture respondents' emails in a 'Single Line text' question type. It can be added using Email Reply feature. You can use <EMAIL_REPLY/> tag once per form/survey.

When forms are ready for launch, insert the plugin and set up the following parameters:

1. **Target Form or Survey Id**: Indicate the target form/survey ID into which the data should be imported. This ID may be found on the main Forms/Survey page. Select a form/survey and it's ID will be shown on the right information pane. It can also be retrieved from the Master URL.

   **Example**
   
   https://app.form.com/f/YYYY/YYYY/ - Where XXXXXX is the Survey ID, and YYYY is the password.

2. **Logical condition**: Specify the logical expression that would determine if the plugin should execute. To create a complex expression for multiple questions use the OR, AND logic operators and Advanced Logic rules.

   If you use "Single line with pre-format options" question as a reference, the structure of the Logical condition will depend on the data format specified for the answer field:

   - **General.** For this data format use Advanced Logic rules for text responses.

   **Table of rules:**

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
</table>
   | ==       | If text responses contain the exact line string indicated next to '==', then logic transition is fulfilled. | Q1.A2==Cat
   |          | This operator can also be used to refer to the record within the dropdown box of the '3D Matrix' type of question in the Qx.Ay. Cz==N format, where N is the sequence number of the item within the dropdown box that is selected by the respondent. | Flower
   |          |                                   | Big Cat
   |          |                                   | Cathlene
   |          |                                   | Cat |
   | <>       | If text responses do not contain the exact line string indicated next to '<>'. then logic transition is fulfilled. | Q2.A3<>Cat
   |          | This operator can also be used to refer to the record within the dropdown box of the '3D Matrix' type of question in the Qx.Ay. Cz<>N format, where N is the sequence number of the item within the dropdown box that is not selected by the respondent. | Big Cat
   |          |                                   | Cathlene
   |          |                                   | Cat |
2. **Name of link** - Enter the link name, and the link to the target form will look as a clickable name. Leave it empty if you want to see just HTML link instead of the linked name. Piping is supported.

3. **Create follow-up as** - Follow-up forms created by this plugin may have **Not Started** or **In Progress** statuses. If **In Progress** option is selected, it is possible to pass data from the 3D Matrix questions of the original form/survey to the 3D Matrix questions with the same number of answer options and scale of the destination form/survey.

4. Please note that if you choose **In Progress** option under **Create follow-up as** setting, **Reminder emails** cannot be sent to such follow-up responses. Follow up responses with **Not Started** status will be able to receive Reminders.

5. **Question References** - Insert references to questions you are sending data from and to using the **Qx.Ay=Qw.Az** format where:
   - `x` - question number of the source survey you are sending data from;
   - `y` - answer choice number of the source survey you are sending data from;
   - `w` - question number of the target survey you are sending data to;
   - `z` - answer choice number of the target survey you are sending data to.

   Please note, that this plugin also works with the question and answer identifiers, so you can use them instead of question and answer numbers in plugin parameters.

   * Decimal Number/Number>0 While creating logical rule for this data format use only the following symbols: >, <, >=, <=, ==, <> For instance,**Q1.A1==1, Q1.A1>=1 OR Q1.A1<=8**

   * If you have a couple of Logical Workflow plugins applied in the original form with different target forms and same condition for execution, the **[LINK_TO_ANOTHER_SURVEY]** tag will be replaced with all links that were triggered by response submission. If you would like to set up separate Email Alerts with a specific target form/survey link, you can use **[LINK_TO_ANOTHER_SURVEY_<target survey id>]** tag. For example, **[LINK_TO_ANOTHER_SURVEY_1166005]**

   * Question references may be edited in Quick Edit box.

   * Please note that questions you are sending data from and to **must have the same structure**, including Sub header references.

   * It is possible to **pass files uploaded by respondents** from one form to another. To do this, simply reference a “File upload” question type and the file uploaded in the original survey will be available for downloading in destination survey.

   * This plugin does not support **3D Matrix** type of question, if the follow-ups are created as Not Started.