

Using Field Definition Rule to filter choices in another field

With recent update to ConfiForms (from version 1.27+) you can enable the rules to filter out choices on smart and db fields (or even just simple dropdown fields) based on the values in another field (or fields)

This allows you to build forms with fields which are easier to fill in by your end users as the choices they have to make can be reduced automatically using the logic you set up



This tutorial uses **ConfiForms version 1.28!**

We have a form with 2 fields, one checkbox and another a field of type "dropdown" with a number of choices. See below

What we want to achieve is to show reduced amount of choices when "checkbox" field is checked (and when unchecked to show all the available choices)

Here is the form definition

```
CONFI: ConfiForms Form (Definition) | formName = fform

CONFI: ConfiForms Form Registration Control

CONFI: ConfiForms Form Field (Definition) | fieldName = checkboxField | ...

CONFI: ConfiForms Form Field (Definition) | fieldName = choicesField | ...
```

Dropdown choices

Edit 'ConfiForms Form Field (Defini

Dropdown ▼

☐ Track changes

Sorting
▼

id	value
1	one and active  
2	two and active  
3	three and inactive  
4	four and inactive  



Field description (optional)

Select macro

We will show only choices 1 and 2 when checkbox field is checked

Will have a rule (actually 2 rules) to filter out when a checkbox field is checked and to show all choices when the field is unchecked

|

CONFID ConfForms Form (Definition) | formName = fform

CONFID ConfForms Form Registration Control

CONFID ConfForms Form Field (Definition) | fieldName = checkboxField |...

CONFID ConfForms Form Field (Definition) | fieldName = choicesField | ...

CONFID ConfForms Rules for Field Definition | actionFieldName = checkboxF...

CONFID ConfForms Rules for Field Definition | actionFieldName = checkboxF...

Added 2 Rules to the configuration with the following setup

First rules to filter out items in "choicesField" (hooked up to "checkboxField" to fire on check/uncheck)

Edit 'ConfForms Rules for Field Definition' Macro

Rules for ConfForms Field Definitions [Documentation](#)

Field name

checkboxField

Name of the field you want to track (optional for validation rules and for rules which should be executed ONLY on users action)

Condition

checkboxField:true

Action will be executed when condition is met. Same syntax expected as in filters The scope is current entry/record (for dataset validation the scope is all records). You can reference current records fields via [entry.field_name]

☐ Execute only on user action

Preview

Action *

Apply Filter on a field

Choose Action to perform

Actionable field name

choicesField

Could be list of field names (comma separated) you want the action to be performed on

Filter to apply on a field

choicesField:2 OR choicesField:1

Use this to filter dropdown (smart or db) field choices. Filter is applied on a referenced form and dataset! You can use [entry.FIELD_NAME] references which are evaluated against the current record

☐ With reverse rule

Select macro

SaveCancel

Preview

Second Rule is to show all the items in "choicesField" when checkbox field is unchecked

Edit 'ConfiForms Rules for Field Definition' Macro

Rules for ConfiForms Field Definitions [Documentation](#)

Field name

checkboxField

Name of the field you want to track (optional for validation rules and for rules which should be executed ONLY on users action)

Condition

checkboxField:false

Action will be executed when condition is met. [Same syntax expected as in filters](#)
The scope is current entry/record (for dataset validation the scope is all records).
You can reference current records fields via [entry.field_name]

☐ Execute only on user action

Preview

Action *

Apply Filter on a field

Choose Action to perform

Actionable field name

choicesField

Could be list of field names (comma separated) you want the action to be performed on

Filter to apply on a field

choicesField:*

Use this to filter dropdown (smart or db) field choices. Filter is applied on a referenced form and dataset! You can use [entry.FIELD_NAME] references which are evaluated against the current record

☐ With reverse rule

When checked, ConfiForms will try to

Preview

Select macro

Save

Cancel

So, we apply a filter to show only items 1st and 2nd in the first rule

choicesField:2 OR choicesField:1

And to show all the items when a checkbox is unchecked

choicesField:*

Storage format for the solution

```

<ac:structured-macro ac:macro-id="0a0bec89-c9f7-4392-beb0-5843444dd0c2" ac:name="confiorm" ac:schema-version="1">
  <ac:parameter ac:name="formName">fform</ac:parameter>
  <ac:rich-text-body>
    <ac:structured-macro ac:macro-id="3b52f7ff-93dc-40e0-a6b5-0a3aec8229c6" ac:name="confiorm-entry-register" ac:schema-version="1">
      <ac:rich-text-body>
        <p> </p>
      </ac:rich-text-body>
    </ac:structured-macro>
  <p>
    <ac:structured-macro ac:macro-id="0ecbdeedc-23ec-4f9f-9e61-5dc397d96244" ac:name="confiorm-field-definition" ac:schema-version="1">
      <ac:parameter ac:name="fieldName">checkboxField</ac:parameter>
      <ac:parameter ac:name="fieldLabel">Select to reduce the choices</ac:parameter>
      <ac:parameter ac:name="type">checkbox</ac:parameter>
    </ac:structured-macro>
  </p>
  <p>
    <ac:structured-macro ac:macro-id="f7f576f3-8c96-4bdc-9fd0-2dce6dca294f" ac:name="confiorm-field-definition" ac:schema-version="1">
      <ac:parameter ac:name="fieldName">choicesField</ac:parameter>
      <ac:parameter ac:name="fieldLabel">Choices</ac:parameter>
      <ac:parameter ac:name="values">>false[1=one and active|2=two and active|3=three and inactive|4=four and inactive]]</ac:parameter>
      <ac:parameter ac:name="type">select</ac:parameter>
    </ac:structured-macro>
  </p>
  <p>
    <ac:structured-macro ac:macro-id="e299f432-49d7-4799-98f1-b34c48d7dee7" ac:name="confiorm-field-definition-rules" ac:schema-version="1">
      <ac:parameter ac:name="condition">checkboxField:true</ac:parameter>
      <ac:parameter ac:name="fieldName">choicesField</ac:parameter>
      <ac:parameter ac:name="values">choicesField:2 OR choicesField:1</ac:parameter>
      <ac:parameter ac:name="action">Apply Filter on a field</ac:parameter>
      <ac:parameter ac:name="actionFieldName">checkboxField</ac:parameter>
    </ac:structured-macro>
  </p>
  <p>
    <ac:structured-macro ac:macro-id="4e1c57e5-675f-4257-a572-c84704664764" ac:name="confiorm-field-definition-rules" ac:schema-version="1">
      <ac:parameter ac:name="condition">checkboxField:false</ac:parameter>
      <ac:parameter ac:name="fieldName">choicesField</ac:parameter>
      <ac:parameter ac:name="values">choicesField:*</ac:parameter>
      <ac:parameter ac:name="action">Apply Filter on a field</ac:parameter>
      <ac:parameter ac:name="actionFieldName">checkboxField</ac:parameter>
    </ac:structured-macro>
  </p>
</ac:rich-text-body>
</ac:structured-macro>

```