

2025 Conditional Form Logics - Display (MVP) (JETO-1698)

 **[JETO-6257] (Build) Conditional Form Logic - MVP Conditional Display (Show/Hide) (21 pts left)** Created: 06/Dec/23

Updated: 25/Nov/25

Status:	In Development
Project:	Jeto
Components:	None
Affects versions:	None
Fix versions:	2025 XX XX [49] Form Conditional Display & PLG Registration
Parent:	2025 Conditional Form Logics - Display (MVP)

Type:	Story	Priority:	Highest
Reporter:	David Desrosiers	Assignee:	David Desrosiers
Resolution:	Unresolved	Votes:	0
Labels:	None		
Σ Remaining Estimate:	0 minutes	Remaining Estimate:	Not Specified
Σ Time Spent:	3 days, 3 hours	Time Spent:	Not Specified
Σ Original Estimate:	0 minutes	Original estimate:	Not Specified

Attachments:

Screenshot 2025-11-25 at 9.15.50AM 1.png

Launcher Home.png

Conditional Form Logic - Filter Rules - Blank@1x (4).png

Jeto Conditional Form Logic - Mockups - Selected Field - New Toggle Menu.png

Conditional Form Logic - Filter Rules - Filled (1).png

Issue links:

Relates

relates to

JETO-6195

(Research/Spike) Conditional Form Log...

In Refinement

Sub-tasks:

Key	Summary	Type	Status	Assignee
JETO-6260	(Research/Spike) Validate BE solution...	Sub-task	Functional Testing	William Sinclair
JETO-6259	BE - Accommodate New Conditional Logi...	Sub-task	Functional Testing	William Sinclair

JETO-6258	FE - New 'Conditional Logics' Section...	Sub-task	In Development	William Sinclair
JETO-6261	FE - New Field Properties based on Co...	Sub-task	In Development	William Sinclair
JETO-6262	FE - Campaign Form updates (1 PTs)	Sub-task	Triage (New)	William Sinclair
JETO-6539	Update QA Grid & Auto Tests (3 PTs)	Sub-task	In Refinement	Yevhenii Snihur
JETO-7138	BE - Block delete form fields presen...	Sub-task	Code Review	William Sinclair
JETO-7142	BONUS FE Address priority level for c...	Sub-task	In Refinement	
JETO-7182	UX Update UX with inlined Field Delet...	Sub-task	Ready to Develop	William Sinclair
JETO-7183	API - Edit Endpoint Get Campaign Deta...	Sub-task	Functional Testing	William Sinclair
JETO-7184	BE+FE fieldkey (marketo token) as ide...	Sub-task	Functional Testing	William Sinclair
JETO-7185	BE Update Clone Launcher Function to ...	Sub-task	Functional Testing	William Sinclair
JETO-8464	Review and Finalize Spec Documentatio...	Sub-task	Triage (New)	David Desrosiers
JETO-8492	Build Quicksight report on feature Us...	Sub-task	In Refinement	David Desrosiers

Story Type: New Feature

Sprint: Products Sprint 48

Epic Link: [2025 Conditional Form Logics - Display \(MVP\)](#)

Story Points: 21

Description

Problem Statement

Given Jeto is used to capture the input of a wide variety of channels (emails, landing pages) and cross multiple use cases (1vs2vs3 speaker webinars) the Jeto Campaign Input forms can stretch pretty long (hundreds of fields). These long forms have a negative effect on users experiences by presenting long forms (sometimes 100+ fields) including some that are not required for the users's specific context.

User Story

Given: Campaign data can be complex and result in lengthy and complex forms, while ideally it should be as consise as possible for optimal UX.

Given: It is a best practices in UX to use dynamic\progressive display (show only what user needs to see) to declutter the UI

When

Admins Set up a Launcher Form & Marketers Fill a Campaign Form.

Then

Admin must be able to create rules to show or hide form fields (dependent fields) based on the value entered in another field(ruling field), These logics must apply as marketers are filling campaign forms.

The following logics should be available:

Conditional display: For field(s) to be shown or hidden based on values in one or in a combination of another field. Conditional logics check if the particular answer(s) is selected and applies the visibility rule (display or hide other questions). This will allow to shorten the campaign creation questionnaire by hiding unnecessary fields and showing fields only when applicable.

Benefits: Campaign creation process is simplified for marketers and reduce form fatigue and potential errors.

Use Cases:

Shorten input form: hide input fields for optional assets\emails: If some assets are optional in a Launcher, it will be possible to add a ruling field that will control which content fields are displayed to the marketers.

Example, if "Number of emails" is set to 1, then hide fields Email 2 Subject", "Email 2 Title"and "Email 2 Body".

Progressive form display: If multiple sub-fields are only required if the ruling field is populated, it will be possible to hide these sub-fields until a value is specified in the "parent" field. Ex: If country is empty, then hide field "City", "Postal Code" and "Street Address".

Terminology

Form Conditional Display: New Section of the form that will host the visibility rules applied to your form.

Form Rule: Defines the desired Ruling Field, Filters Conditions and Outcomes (Display for now but will expand to value in future state)

Filter: Logical expression that defines each criteria for validation. There can be multiple filter conditions in one Rule

1. **Ruling Field** Identifies the field (key) from upon which the operator is applied.
2. **Field Type:** property of the field (integer, numeric, string, date, etc) that determines the operators that can be used to restrict in filters
3. **Operator:** Depending on the type of filter, the operators that are available for filtering your audience. (Contains, Equals, is Greater than, Not Equal, etc.). Operators are dependant of the Attribute. For example, only data and numeric can have “Between” operator - string text cannot.
4. **Value:** The value you want to use to filter your audience. Depending on the type of operator or filter value (for example, string, integer, date), either enter the value directly in the box or select it from a list.

Display Outcome: desired action to show \ hide elements

1. **Dependent Field(s)** Identifies the field(s) upon which the Outcome is applied
2. **Display State:** visibility state to apply: show or hide

Acceptance Criteria

General Requirements

0- Show\Hide Property: Each fields now have a property of “display” and can be set to show\hide (default to show) which defines their original state (current state)

1- Many-to-Many: Each Form can have one or multiple Conditional Display Rule(s) as a Ruling Field or as a Dependent Field

2- All Conditional Logics for all fields are visible in a single place, but can be access from each individual field (all leading to same panel with all rules visible)

3- A field can have no Conditional Logic, a single logic or multiple logics applied.

4- Admin can select a Ruling field to which the Logic will apply.

5- For each Logic Admin can toggle between Form a “Conditional Display” THAT’S IT FOR NOW - (future state: will show 2nd option: “Conditional Value”)

6- If a field s hidden following conditional display, then validation will not be performed on these fields (required, format, etc).

7- If rules are conflicting the last rule in the list will apply. (future state: advanced conflict validation)

8- Rule Validation: If a Rule is incomplete, then we validate the entry upon defocus (same as form fields) with red text above input “Please complete the missing rule details” (same as destination folder rules)

Create/Edit Launcher Form Fields Display Rules Requirements

Rules structure: Each Rule is composed of a set of:

IF =>Filter: Logical expression that defines each criteria for validation. There can be multiple filter conditions in one Rule

- Ruling Field Identifies the field (field_key) upon which the operator is applied. There is a single ruling field per rule, therefore advanced logic (AND/OR) is not required (See Future State Section for Multiple dependent field rules)
- Operator: Depending on the type of filter, the operators that are available for filtering your audience. (Contains, Equals, is Greater than, Not Equal, etc.). Operators are dependant of the Attribute. For example, only data and numeric can have “Between” operator - string text cannot.
- Value: The value you want to use to filter your audience. Depending on the type of operator or filter value (for example, string, integer, date), either enter the value directly in the box or select it from a list.

THEN =>Display State: desired action to show \ hide elements

- Dependent Field(s): Identifies the field(s) upon which the Display State is applied - this should include ALL field types (including Ui fields elements like titles and paragraphs)
- Display rule: visibility attribute to apply (show or hide)

ELSE

- This is just UX information copy to expose the Display State if the filter conditions are not met to the users

Display Rules Field Types & Opertators

Included field types: ([See Jeto Form Spec Grid](#)).

- Single Line Text (String)
- Single Select (String)
- Multi-Select (String)
- Date (Date)
- Email (String)
- Number (Number)
- Image (String) - presence or not of an image uploaded

Excluded field types:

- Rich Text
- File
- Phone
- Time

Operator	Supported on Field Types
Is Null	String Date Number
Is Not Null	String Date Number
Equals	String Date Number
Not Equal	String Date Number
Contains	String
Does not Contain	String
Before	Date
After	Date
Between	Date Number
In Future	Date
In Past	Date
Greater Than	Number
Less Than	Number

Example:

- IF field “Region” equals “EMEA”
Then “Show” Field “EMEA Details”
ELSE hide selected fields
- IF “Event Date” is before “Dec 15”
THEN “Hide” fields “Turkey Allergies; Coat Check; Number of kids”
ELSE “Show” selected fields

Campaign Editor Requirements

- Dependent fields will be shown or hidden at the time of page load and at time where user is editing the ruling field (at each keystroke) for string text or number or on selection values for single / multi select fields or on validated full date input.
- Ruling Field entry must be valid for the rule(s) to apply.
- Campaign Clone: All Conditional Logics Rules are cloned and applied to the new Launcher upon cloning a Launcher that contains CL.
- If a field is hidden by Conditional Display, we do not submit the field value in the campaign create/update payload (e.g. even if the field contains a prefill value)
- If a value had previously been submitted, then the field gets hidden by conditional display, it is expected that, if applicable, an update to this field will be ignored, and therefore the Marketo token value will reflect the last submitted value.

Non Functional Requirements

- Performance
 - The UI must update to show/hide dependent fields in under 200ms after the user's input in a ruling field to feel instantaneous.
 - Load Time: The form editor and campaign form should not have a noticeable increase in load time, even with a high number of conditional rules.
 - The system should support up to 25 conditional rules per form without performance degradation. (The current PRD mentions "typically no more than 10 rules," but we will not set a hard limit is not required for now).

Product Analytics Requirements

- Adoption Rate: 30% of forms utilize the feature within the next 6 months.
- User satisfaction: NPS will increase for admins and marketers clients using the feature.

UI-UX Requirements

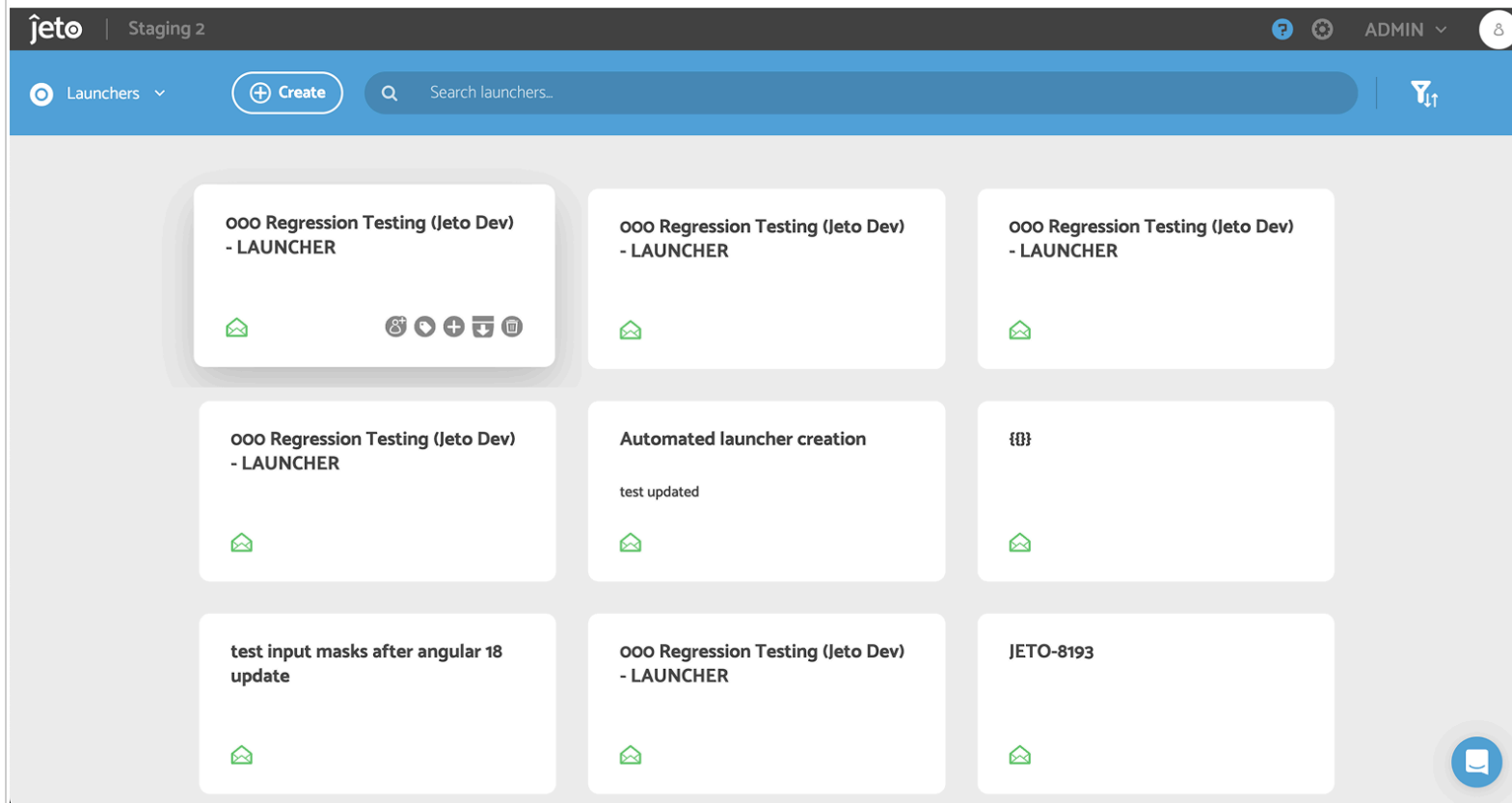
Low Rez Mockups

Low Rez Prototype

(PW= “spin-spec-young-five”)

High Level UX Flow - Edit Launcher Form - Display Rules

1. Launcher Home Use selects Launcher tile to edit



1. Edit Launcher Page loads with form preview. Use select the edit action (green button)

jeto | Staging 2

ADMIN

✓ Save Changes | ✕ Cancel | Email - 000 Regression Testing (Jeto Dev) - LAUNCHER

Form Assets Settings

Campaign Name *

Invitation Body *

Confirmation Message *

Reminder Message *

1. Form Editor Side Panel is expanded. User selects a specific field to see properties. New Toggle menu displays on top of side pane. "Field Properties Conditional Logic" . Admin selects "Conditional Logic" to access the new feature.

Staging 2

2022-03-22 [Global] Observability trends in 2022 - On-demand

Edit Form

Campaign Name *

Invitation Body *

Confirmation Message *

Reminder Message *

Save

Field Properties

Conditional Logic

2 / 4 - Invitation Body (textarea rich text)

< | >

New Editor (Beta)

Give feedback

Marketo Token

Label Text

Invitation Body

Label Position

Top

Required Field

Advanced

1. Conditional Logic options are displayed. User clickson “Add New Rule +” to add a new rule for this Launcher form.

Staging 2

Save Changes Cancel 2022-03-22 [Global] Observability trends in 2022 - On-demand Edit Form

Campaign Name *

Invitation Body *

Confirmation Message *

Reminder Message *

Add a form element

Save

Field Properties Conditional Logic

Add New Rule +

IF

Field... Operator Value

THEN Show Select field(s)

ELSE Hide field(s)

Conditional Logic - Menu Options - Filled State. Selected Ruling Field, Display State, Dependent Field(s)

Staging 2

Save Changes Cancel 2022-03-22 [Global] Observability trends in 2022 - On-demand Edit Form

Campaign Name *

Invitation Body *

Confirmation Message *

Reminder Message *

Save

Field Properties Conditional Logic

Add New Rule +

IF Speakers Equals 1

THEN Hide

Select field(s)

ELSE Search

IF Firstname Lastnamelorem (Field_Key1)

THEN Firstname Lastnamelorem (Field_Key2)

ELSE Firstname Lastnamelorem (Field_Key3)

IF Firstname Lastnamelrem (Field_Key4)

THEN Speaker 2 Name (Speaker_2_Name)

ELSE Speaker 2 Bio (Speaker_2_Bio)

Speaker 2 Headshot Image (Speaker...

IF Speakers Less than 3

THEN Show

Hide

ELSE Hide field(s)

IF Country Is not null

THEN Show

Region Group

ELSE Hide field(s)

<https://mergeworld.atlassian.net/si/jira.issueviews:issue-html/JETO-6257/JETO-6257.html>

12/17

UX Details - Edit Launcher Form Display Rules

- From the Launcher Form Editor Page, on the side panel New Sub Menu to navigate between “Field Properties” and “Conditional Logics”
 - Under conditional logics user can create a new rule
 - (IF) In each rule, User can add
 - One ruling fields from picklist: the fields can be searched and fields are displayed in picklist in order according to the form “order display”,
 - One Operator, picklist options are restricted to compatible options (see table) and ordered alphabetically
 - One Value (also alphabetically if applicable).
 - (THEN): In each rule, User can select the desired outcome
 - Display: in order “Show, Hide”
 - Dependent field: One or multiple dependent fields (s) in multi select - The fields display as “Field Label (Marketo Token Name)” and be searched and are displayed in picklist in order according to the form “order display”
 - ELSE We show user the ELSE behaviour (which is opposite of the Show/Hide selected above)
 - User can Repeat (add as many rules as needed) - typically no more than 10 rules....
 - Ex:
 - IF...field “region” equals “Asia”
 - THEN Hide
 - Fields: (Multi Select)
- EMEA Subject Line
- EMEA Body
- EMEA CTA button
- ELSE show selected field(s)
 - General UX precisions:
 - Order of rules: Rules will display in the order in which they are created.
 - User must have the ability to add a field, then immediately see it available in conditional logic (without requiring a Launcher Save or refresh)
 - Other UX Updates to form field main area - **see** <https://mergeworld.atlassian.net/browse/JETO-7182>
 - The gear icon is removed (not used currently)
 - Margins are added right and left of field to make room for below:
 - On Hover (or click for mobile)
 - The option to delete a field is displayed (moved from the side bar to the field itself).
 - The grab\drag icon is added left of fields
 - If a field is used as a Ruling fields or a Dependent field in Display Rule,

- The delete action is disabled - tooltip displays on hover with adapted message (common to using field in naming convention or Automated Launch: "This field cannot be edited because it is used in Automated Launch, Naming Convention or Conditional Logic".
- Editing the Token name is disabled and hover displays tooltip - same message as delete above.
- Given we use the Marketo Token Name as field key, only fields that contain a Token Name will be available in CL. (Ex: newly created fields with missing Token Name will not show.
- Other: See comments in Figma mockups for precisions

Entitlement

This feature is included in all plans and on all accounts.

Background and Client Research

Ideas Portal Summary

33 Votes

Accounts List

Customer Input:

Support Team : 'm thinking specifically of something along the lines of "how many emails will you be sending?" Based on the answer, we only display the fields pertaining to email 1, 2, 3 and/or 4 etc. We still need flexibility to delete modules of course so the "mandatory" fields would no longer be mandatory if the module is deleted in the preview. Furthermore, if possible, we would hide the "unused" emails from the preview. Thanks!

===

If a field is a dropdown, it would be great to make the following field pre-filled conditionally to the value selected in the 1st field. Ex: if your drop down is 3 cities and the next field is country, your drop down would be Montreal, Dallas and Cartagena. If Montreal is selected, the pre-fill for country would be Canada but if Cartagena is selected, the pre-fill would be Colombia.

===

In addition to conditional logic to show/hide questions within the campaign creation questions (noted in this idea - <https://ideas.jeto.io/ideas/JETO-I-181>), it would be very helpful to also show/hide blocks of content in the layout. We are working on a very copy heavy landing page that portions of the page that will change depending on the needs of the program. This feature would help us avoid having to include more content then needed, avoid the need for multiple versions, and provide reassurance the correct content is included, by allowing the person to include only the blocks they need based on the options selected in their campaign creation.

Out of Scope / Future State

Future Enhancement	Description	Rationale for Deferral
Control Default Display Status	Define if a field should be shown or hidden by default.	Rules allow to hide any field, therefore having all fields visible initially
Identify fields where rules are applied inside field preview	Allows the admin to quickly identify if any given field is used in Display rules in the main form panel where the fields are listed.	We have a workaround for this that consists in opening the side pannel where all rules applied to the entire form are displayed in a single place. More user input needed to prioritize
Multiple Ruling Fields & Advanced Logic	Allowing user to create rules with multiple ruling fields and advances logics (and/or) statements.	Additional complexity/effort vs value tradeoff. Workaround exist by adding multiple separate rules.
Advanced Conflict Validation	Advanced validation will be considered after observing how users interact with the feature and what conflicts arise.	The "last rule wins" approach is sufficient for the MVP. More user input needed to prioritize
Automatically edit Assets\Modules Logics (delete modules) based on form logics	High Level of complexity given there is no direct relationship between field and assets section.	Considered a separate feature -likely to be replaced by advanced Editor.
Dependent Field Groups	That would allow admins to predefine field groups, and for these field groups to be selected in dependent field rules (show \ hide group of fields. A great UX improvement but not MVP	Given workaround is viable: we will order fields based on form display order , and admin can check all individual fields that apply (For example to hid all "Speaker 2 fields from the form at once)
Test Form / Logic	Admin can preview and test the campaign form to make sure it works as expected.	Given workaround is viable: Admin can save Launcher, head to /campaigns and test it there with the rest of the form/assets.
Conditional Logic - Value	Allows user to create rules that will automatically set the value in the dependent field based on the value present on a ruling field.	Deferred to a future release to focus the MVP on the higher-priority 'show/hide' functionality, which addresses the primary user pain point of form complexity.

Documents and References

- Formly conditional rendering:<https://formly.dev/docs/guide/expression-properties/#2-conditional-rendering>

Comments

Comment by [Fahad Khan \(Inactive\)](#) [26/Aug/24]

[Stevens Valéry NELSON](#) Tairik is OOO but I believe you may start working on doing some BE work for this ticket and the associated BE research task. You can go through the description and let me or William know your questions

Comment by [Stevens Valéry NELSON \(Inactive\)](#) [26/Aug/24]

[Fahad Khan](#) ok, no prob

Comment by [Charles Albaut \(Inactive\)](#) [01/Oct/24]






[David Desrosiers](#) finalizing what's in Conditional Logics for now but reviewing and testing everything has brought up a few missing parts of the specs. I've listed everything I've come across today as well as potential solutions. TBD

- Delete Field disappeared from the new UX. Not way to delete a field.
 - Proposed solution: add it back next to the field navigation arrows
- No error-handling specified when deleting a field
 - Proposed solution: as we do for naming convention, remove the option to delete the field when it's part of a CFL
- It is currently possible to add a field even when it's missing its token name which is its unique identifier
- I cannot pass the brief_form_field ID to the PUT payload for rules until the field has been created. Currently relying on field order but need some precisions on what to do here.
 - Proposed solution:
 - use field key instead of brief_form_field_id as identifier (same as naming convention)
 - Prevent changing the field key like with naming convention/auto-launch
- We have no way to identify which form the campaign is tied to after its creation
 - EX: when we create a campaign from a launcher, we load the launcher with it and get the launcher form from there based on which we can fetch the rules
 - When we load a draft/campaign, we only get the form_fields associated to it but never the form itself.
 - Moreover, we need a way to duplicate the rules when creating a campaign since we save the campaign as a new form as well...
 - Proposed solution:
 - add campaign_form_id to the Campaign object
 - Duplicate rules when a campaign is created from the launcher the same way we duplicate the launcher form
 - Fetch new rules based on campaign_form_id


cc: [Tairik da Costa William Sinclair](#)

Comment by [Charles Albaut \(Inactive\)](#) [02/Oct/24]

From discussion:

- Delete Field disappeared from the new UX. Not way to delete a field.
 - Proposed solution: add it back next to the field navigation arrows
 - =>  To be added directly on the field itself, remove gear icon and add delete icon. TBD by [David Desrosiers](#)
- No error-handling specified when deleting a field
 -  Proposed solution: as we do for naming convention, remove the option to delete the field when it's part of a CFL
 - => New icon (icon-launcher-card-delete) on the field would be greyed out and tooltip would show that the field is used in NC or Auto Launch or CFL
-  It is currently possible to add a field even when it's missing its token name which is its unique identifier
- I cannot pass the brief_form_field ID to the PUT payload for rules until the field has been created. Currently relying on field order but need some precisions on what to do here.
 - Proposed solution:
 -  use field key instead of brief_form_field_id as identifier (same as naming convention)
 -  Prevent changing the field key like with naming convention/auto-launch

=> [David Desrosiers](#) to create task for Stevens for these changes

- We have no way to identify which form the campaign is tied to after its creation
 - EX: when we create a campaign from a launcher, we load the launcher with it and get the launcher form from there based on which we can fetch the rules
 - When we load a draft/campaign, we only get the form_fields associated to it but never the form itself.
 - Moreover, we need a way to duplicate the rules when creating a campaign since we save the campaign as a new form as well...
 - Proposed solution:
 -  Return form_rules in the payload

=> [David Desrosiers](#) Edit GET Campaign Details endpoint to return form_rules in the payload when include=form_rules is specified

Comment by [David Desrosiers](#) [28/Oct/25]

[William Sinclair](#) Can you confirm if "Number" field types can now be used as a Ruling field in the current code?

Ex: SHow field C if Field A (Number) Value is > 5...

Comment by [David Desrosiers](#) [14/Nov/25]

[William Sinclair Tairik da Costa](#) UI/UX was revised. Pls have a look:

<https://www.figma.com/design/beD4B5ArXNvZ40CyfhVm9a/03---Setup-Launchers?node-id=0-9542&p=f&t=p1bNRPIAySshwBUB-0>

Comment by [David Desrosiers](#) [17/Nov/25]

[Yevhenii Snihur](#) [William Sinclair](#) [Tairik da Costa](#) The functional spec doc is AI-reviewed and ready for QA Plan and QA grid build.

Generated at Tue Nov 25 20:43:20 UTC 2025 by David Desrosiers using Jira 1001.0.0-SNAPSHOT#100290-rev:26df02bac11e213c3bedf009bee40fcc2d5ace17.