

Setting up the form

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In this tutorial, we aim to build a detailed Loan Assessment tool. This tool will help users determine their loan eligibility. We'll be using MakeForms to delve deep into its logic functionality. The demonstration involves a step form divided into 9 sections. Depending on the loan application type, some steps will be skipped. Here are the specific conditions we'll implement:

1. Only accept loan applications originating from the USA.
2. Display steps relevant to the chosen loan type: business or personal.
3. In the business details section, if the revenue is either below \$1M or exceeds \$5M, present a message and hide subsequent steps.
4. For the address input, if the communication address matches the billing address, auto-fill the communication address with the billing address details and disable further editing.
5. For personal loans, if the loan factor surpasses 30, display a rejection message; otherwise, show an approval message.
6. For business loans, if the loan factor exceeds 50, display a rejection message; if not, show an approval message.

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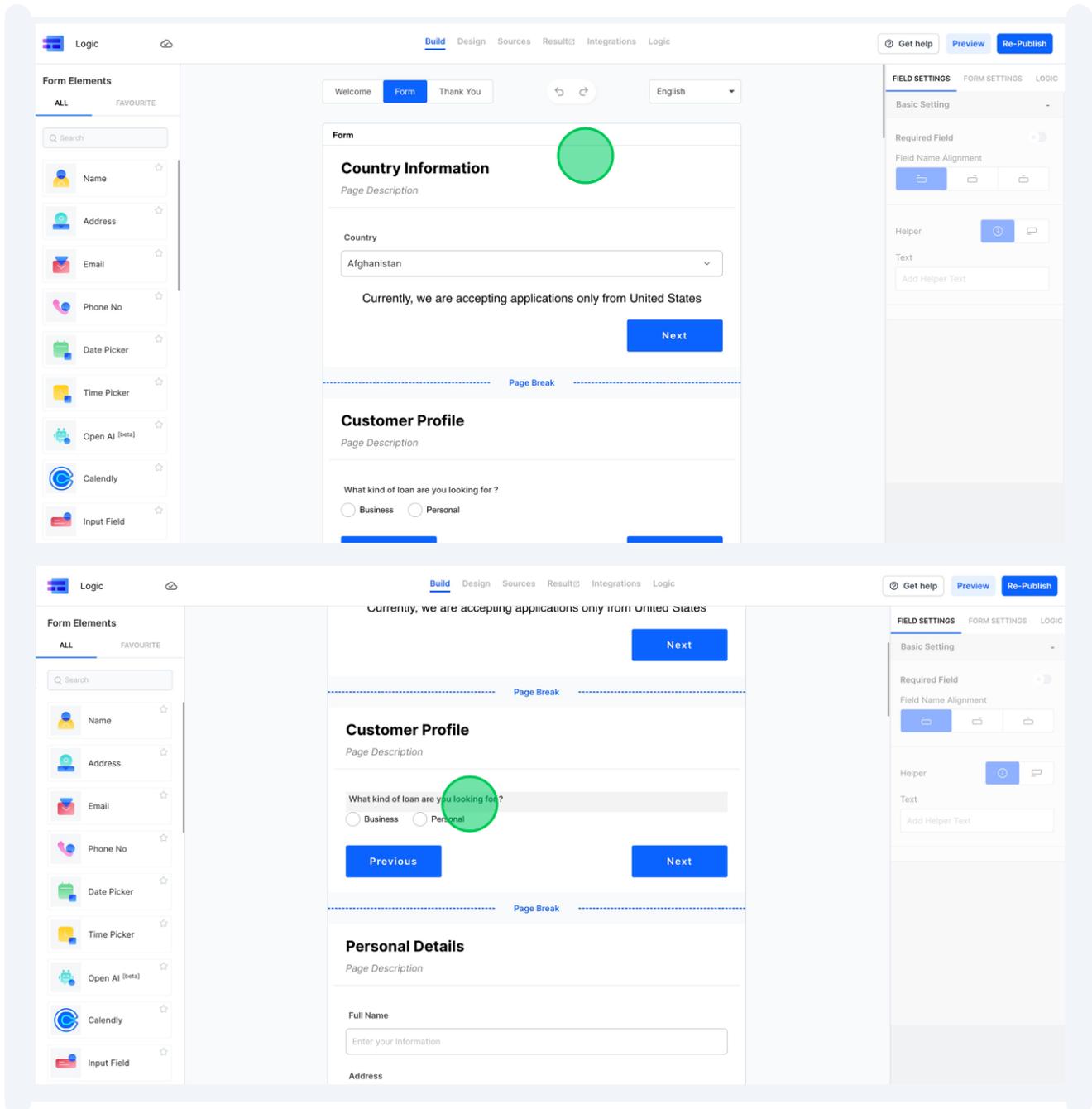
Let's break down the steps for our Loan Assessment tool:

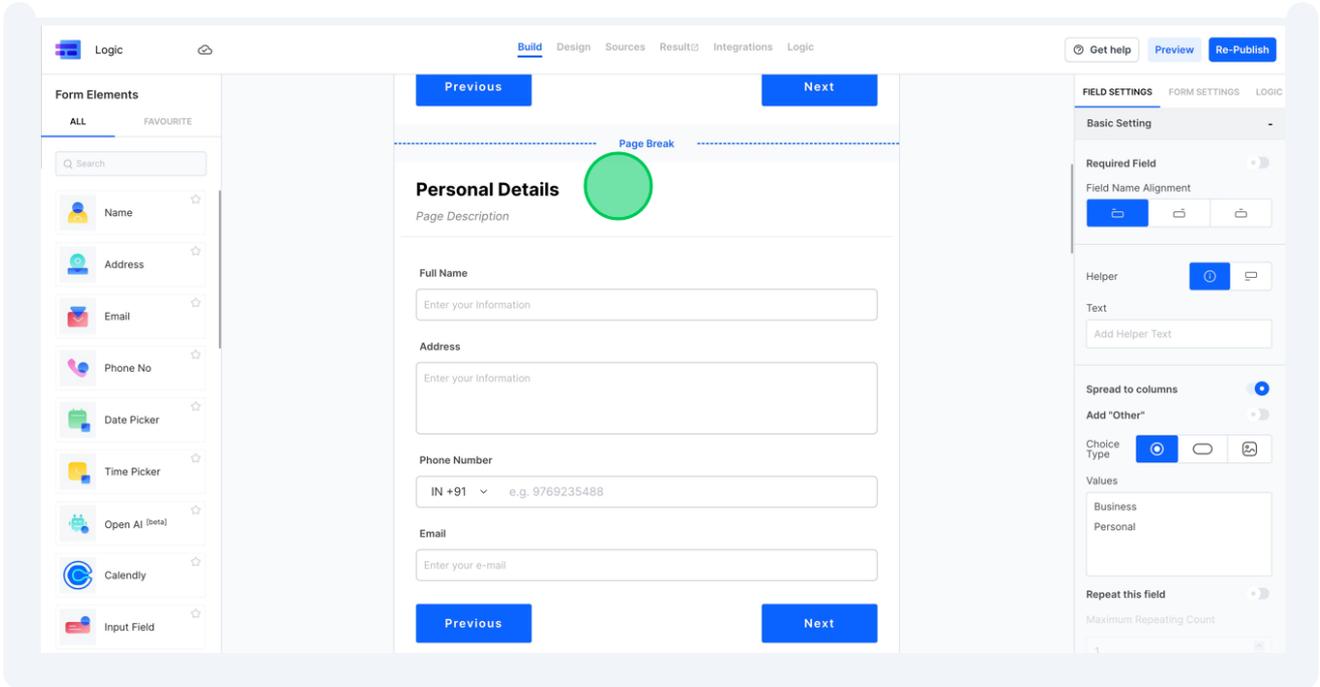
Step 1: Country Information: This is our initial step. Here, users will choose their country of residence. There's also an accompanying message that will be displayed if a user selects a country other than the USA.

Step 2: Customer Profile: In this step, the user indicates the type of loan they're interested in, either business or personal.

Step 3: Personal Details: This step will only appear if the user opts for a Personal Loan in the previous step.

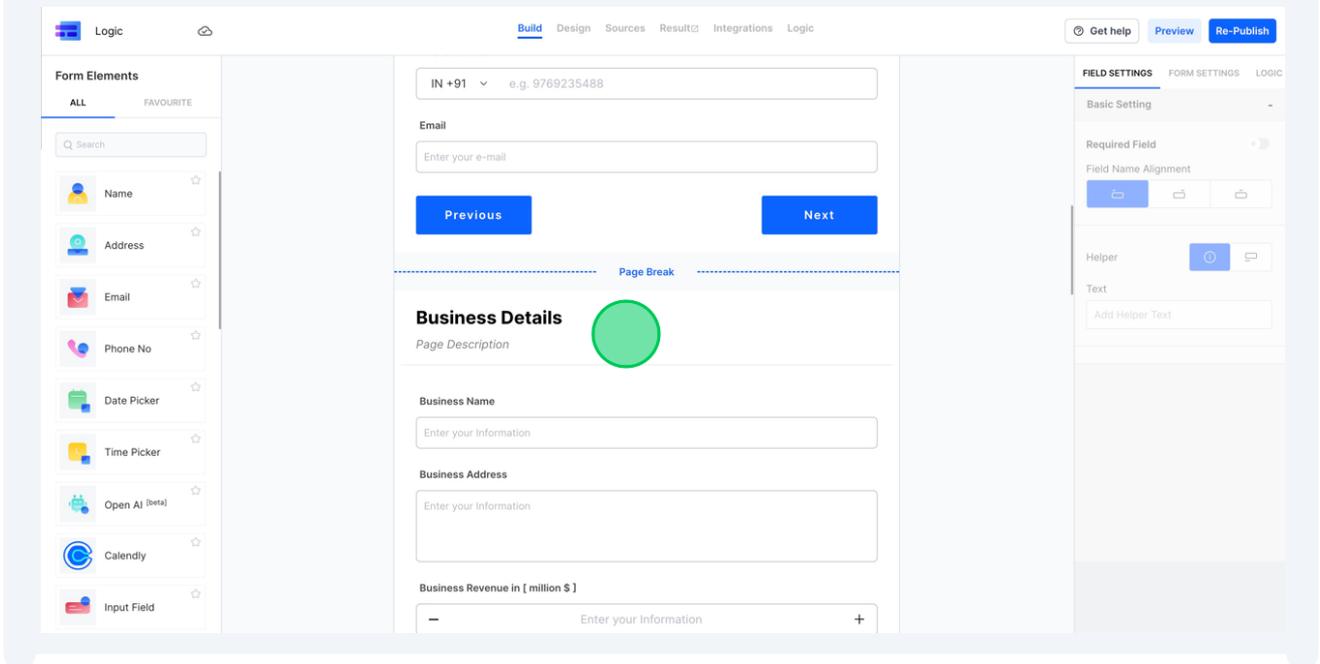
For a detailed guide on creating a step form, please refer to our dedicated documentation [here](#).

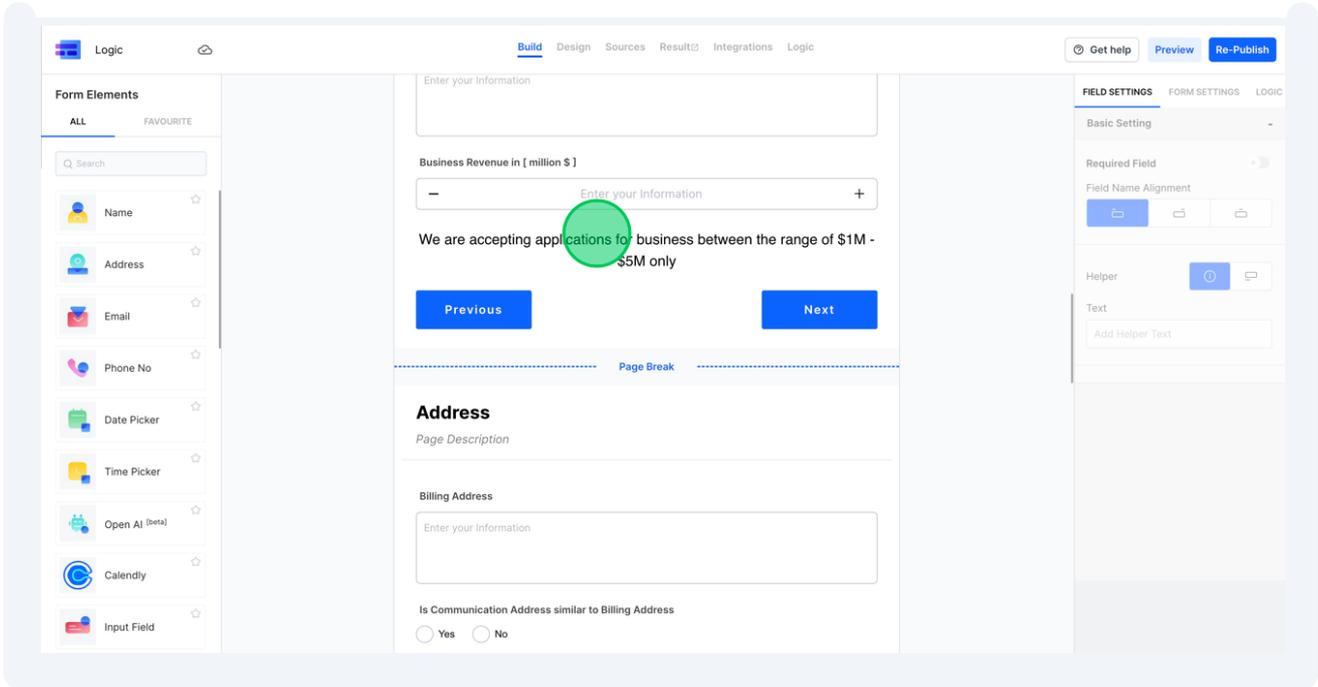




3 Step 4 : Business Details:

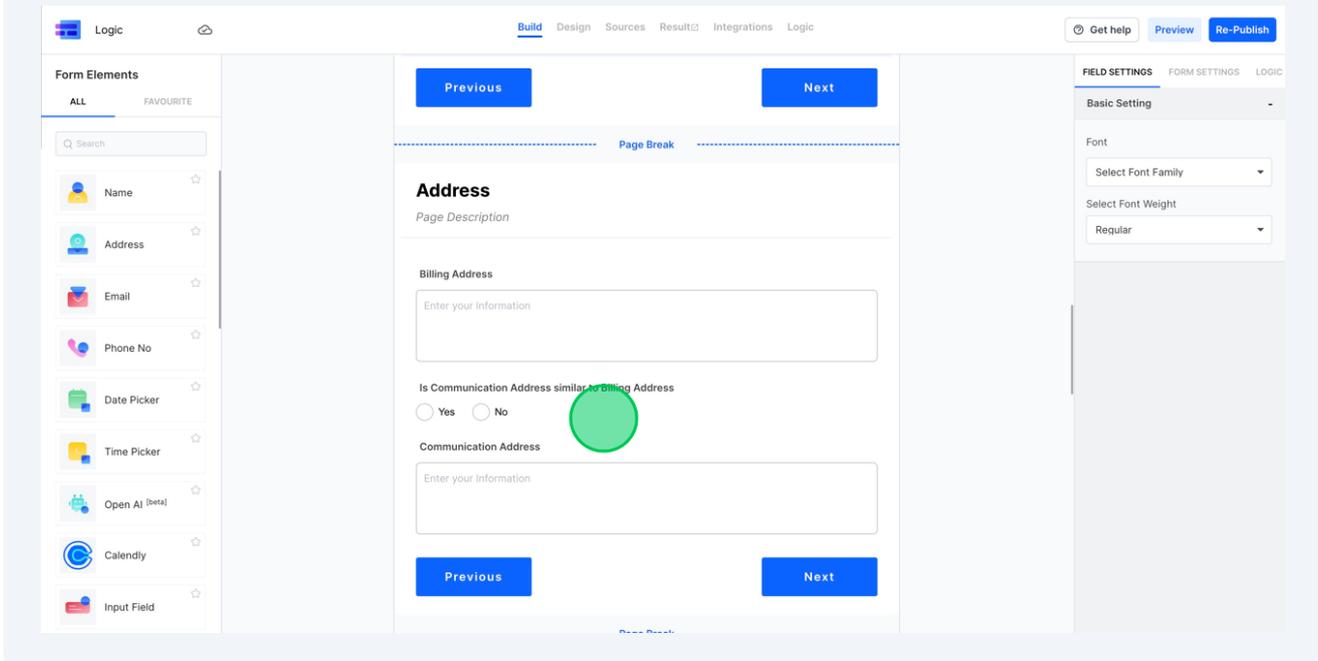
This section becomes accessible only when the user chooses the "Business" loan option. To add a twist to our process, we've set a specific revenue criterion for eligibility. If the user's revenue isn't within the range of \$1M to \$5M, they won't be able to continue with the application.





4 Step 5 : Address Details:

This step is universal and will appear regardless of the loan type selected. Within this section, we have implemented a convenient feature. If the user indicates that their communication address is the same as their billing address by selecting "Yes" for the "Is Communication Address similar to Billing Address" option, the system will automatically populate the communication address fields with the billing address details.



5 Step 6 : Personal Loan Details:

In this phase, users will input their personal income and the desired loan amount. For the purpose of our demonstration, we'll introduce a concept called the "loan factor." This is a hypothetical metric, and its value is determined by dividing the requested loan amount by the user's annual personal income.

The screenshot displays a form builder interface for creating a "Personal Loan Details" form. The central workspace shows a form with the following elements:

- A "Previous" button at the top left and a "Next" button at the top right.
- A "Page Break" separator.
- The form title "Personal Loan Details" with a "Page Description" field below it.
- An input field for "Personal Annual Income [in US\$]" with a placeholder "Enter your Information".
- An input field for "Loan amount looking for [in US\$]" with a placeholder "Enter your Information".
- An input field for "Personal Loan Factor" which is highlighted with a green circle.
- Another "Previous" button at the bottom left and a "Next" button at the bottom right.
- A second "Page Break" separator at the bottom.

On the left, the "Form Elements" sidebar lists various components: Name, Address, Email, Phone No, Date Picker, Time Picker, Open AI (beta), Calendly, and Input Field.

On the right, the "FIELD SETTINGS" panel is visible, showing options for "Basic Setting", "Required Field", "Field Name Alignment", "Helper", "Text", "Spread to columns", "Add 'Other'", "Choice Type", "Values" (Yes/No), and "Repeat this field".

6 Personal Loan Details (continued):

To determine the "loan factor," we'll utilize a calculated field within our form. By applying the given formula – dividing the desired loan amount by the annual personal income – we'll obtain the loan factor value. This calculated metric will be pivotal in our decision-making process. Specifically, a user will be deemed eligible for the loan only if their loan factor is under 30.

The screenshot displays a form builder interface with two main panels. The left panel shows a form with two input fields, both labeled "nation", and a blue "Next" button at the bottom. The right panel is a configuration sidebar. It includes a "Helper" section with an information icon and a copy icon. Below that is a "Text" section with a text input field containing "Add Helper Text". The "Calculation Builder" section shows a formula: $\text{Loan amount looking for [in US\$]} / \text{Personal Annual Income [in US\$]}$. A green circle highlights the first field in the formula. Below the formula, a message states "Formula is correct." with a checkmark icon. At the bottom of the sidebar, there is an "Add Field" dropdown menu and a row of navigation buttons: a left arrow, an opening parenthesis, a closing parenthesis, and a forward slash.

7 Step 7 : Business Loan Details:

Just as with the personal loan, we'll introduce a "business loan factor" for business loans. This factor will be calculated in a similar manner. For our demo's purposes, a business will be considered eligible for the loan only if its business loan factor is under 50.

The screenshot displays a user interface for configuring a calculation. On the left, a vertical sidebar contains several elements: a top button with a plus sign, a second button with a plus sign, a greyed-out button, a text input field, and a prominent blue button labeled "Next". The main workspace is divided into two sections. The upper section, titled "Text", contains a text input field with the placeholder "Add Helper Text". The lower section, titled "Calculation Builder", shows a formula being constructed. It features two green boxes representing fields: "Loan amount looking for [in US\$]" and "Personal Annual Income [in US\$]", connected by a blue division symbol (/). A green circle highlights the division symbol. Below the formula, a grey box displays a checkmark and the text "Formula is correct.". At the bottom of the calculation builder, there is a dropdown menu labeled "Add Field" and a row of four empty input boxes.

8 Step 8 : Outcome for Business Loan:

In step 8, users will be presented with either a success or failure message based on their business loan application. The message will indicate whether they qualify for the business loan (if the business loan factor is below 50) or if they're ineligible (if the factor is 50 or above).

The screenshot displays a form builder interface with the following components:

- Form Elements Sidebar:** Lists various form components such as Name, Address, Email, Phone No, Date Picker, Time Picker, Open AJ [beta], Calendly, and Input Field.
- Preview Area:** Shows a form titled "Business Loan Factor" with "Previous" and "Next" buttons. Below this is a "Page Break" and a section titled "Business Loan Application Status". This section contains two messages: a success message ("Your business loan application has been accepted. Someone from our team will get back to you soon with further details.") and a failure message ("We are sorry. Based on the answers provided, your business loan application cannot be processed."). A green circle highlights the word "Someone" in the success message. Below the messages are "Previous" and "Next" buttons. Another "Page Break" follows, leading to a section titled "Personal Loan Application Status".
- Field Settings Panel:** Located on the right, it includes sections for "Basic Setting" (Field Name Alignment, Placeholder Text), "Helper" (Add Helper Text), and "Calculation Builder" (Business Loan amount looking for [in US\$], Business Revenue in 2022, Formula is correct, Add Field).

9 Step 9 : Outcome for Personal Loan:

In this ninth step, users who applied for a personal loan will see either a success or failure message. The outcome is determined by their personal loan factor. If the factor is below 30, they'll receive a success message indicating their eligibility. If the factor is 30 or above, they'll be presented with a message indicating their ineligibility.

The screenshot displays a form builder interface with a central canvas and side panels. The top navigation bar includes 'Logic', 'Build', 'Design', 'Sources', 'Results?', 'Integrations', and 'Logic'. On the right, there are buttons for 'Get help', 'Preview', and 'Re-Publish'. The left panel, titled 'Form Elements', lists various components like Name, Address, Email, Phone No, Date Picker, Time Picker, Open AI (beta), Calendly, and Input Field. The central canvas shows two pages separated by a 'Page Break'. The top page is titled 'Business Loan Application Status' and contains two text blocks: a success message ('Your business loan application has been accepted...') and a failure message ('We are sorry. Based on the answers provided, your business loan application cannot be processed.'). Below these are 'Previous' and 'Next' buttons. The bottom page is titled 'Personal Loan Application Status' and contains two text blocks: a failure message ('We are sorry. Based on the answers provided, your personal loan application cannot be processed.') and a success message ('Your personal loan application has been accepted...'). Below these are 'Previous' and 'Submit' buttons. A green circle highlights the word 'your' in the failure message on the bottom page. The right panel, titled 'FIELD SETTINGS', shows 'Basic Setting' with options for 'Font' (Select Font Family, Select Font Weight) and 'Regular'.

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To conclude, we've successfully set up our Loan Assessability Form, capturing all the necessary steps for both business and personal loan applications. With the foundational elements in place, in Part 2, we will delve into establishing the requisite logic to ensure our form operates seamlessly and effectively. Stay tuned for the next segment where we'll make our form fully functional.