

Linking Between Forms

Overview

Case management allows you to save data from one form and use that data later on in another form. Here's how to set this up:

Say you want to use the answer to "What is your edd?" in Registration later on in your Followup form.

1. Set up [case management](#) in your application
2. Create a question in Registration for "What is your edd?". It doesn't matter what the question ID is.
3. Go to the Case Management for the Registration form:
 - a. Select "What is your edd?" from the dropdown
 - b. Write "edd" in the case property box.
 - c. Hit "save". The answer to "What is your edd" is now saved to the case as case property "edd"
4. In the followup form, reference that case property by typing #case/ and choosing the property you want to reference

NOTE:

When data get saved to the case as properties, they're *always* saved as text. If you reference them in a form, even if you set the data type to be "date" or "int" or whatever is appropriate, they're still really strings. If you want to use it in a calculate or a comparison expression, you have to "cast" it to the desired data type. For example, if you reference a property into the hidden value "date_question", you have to reference it as `date(#case/date_question)`. Other available cast operators are `int()`, `boolean()`, `number()` and `string()`.