



Apply Logic

Help Guide

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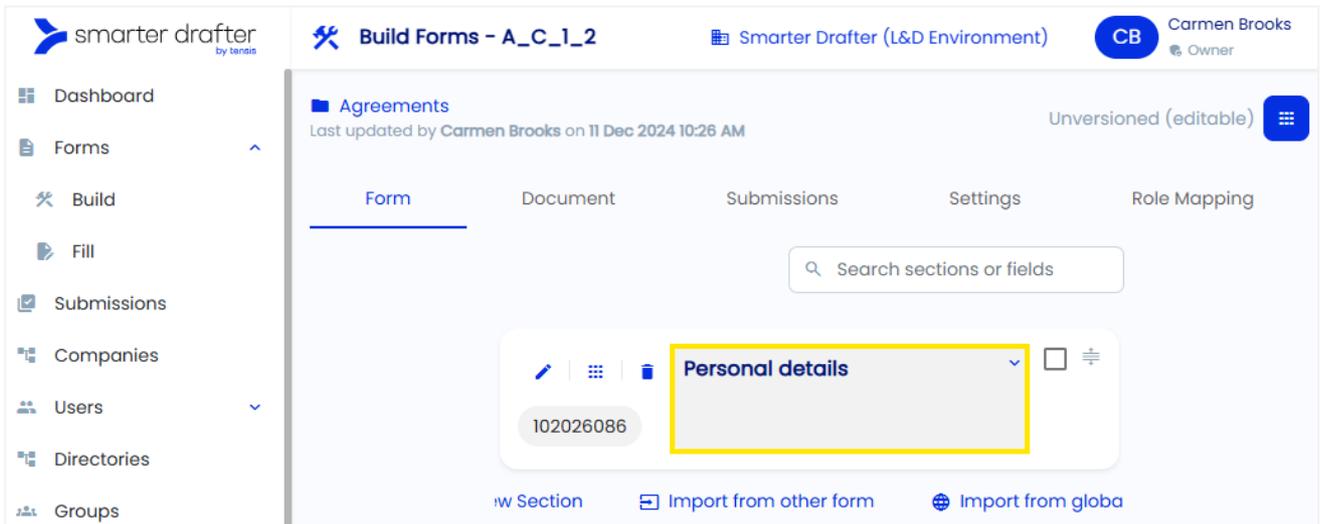
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1. Using Logic to Improve Flow in Forms

Logic is what makes a form appear smart. Rather than asking users every question in the form, we can selectively show or hide fields (or sections) by using logic (rules). By default, when a field has no logic applied it will always be shown to the user. As soon as logic is applied, a field will only be displayed if the rule is true.

1.1 Edit the Form

Open the form in the **Form Builder** (in this example, the form created in Module Two, Lesson One will be used). Click the section to edit the fields.



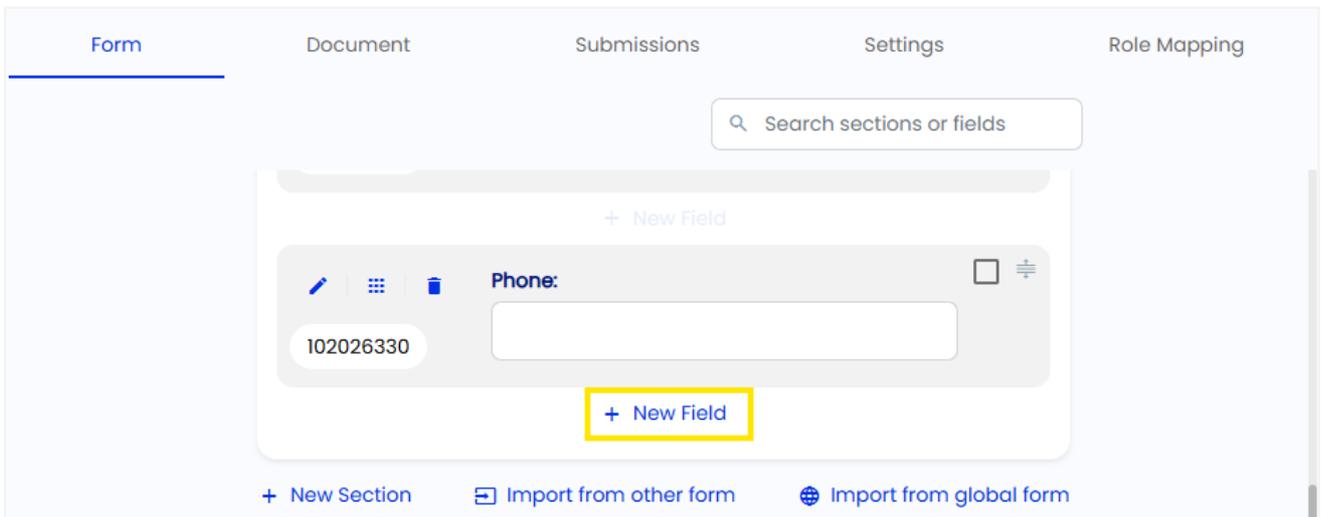
The screenshot displays the Smarter Drafter Form Builder interface. On the left is a navigation sidebar with options: Dashboard, Forms, Build, Fill, Submissions, Companies, Users, Directories, and Groups. The main area is titled 'Build Forms - A_C_1_2' and shows a form named 'Agreements' (Unversioned (editable)). Below the title are tabs for 'Form', 'Document', 'Submissions', 'Settings', and 'Role Mapping'. A search bar labeled 'Search sections or fields' is present. A section titled 'Personal details' is highlighted with a yellow box. Below this section is a text input field containing the value '102026086'. At the bottom, there are buttons for 'New Section', 'Import from other form', and 'Import from global'.

2. Add Logic to Lists

Logic can be applied to sections and most field types but is often used with lists of options - depending on the response, the form filler is taken through different questions.

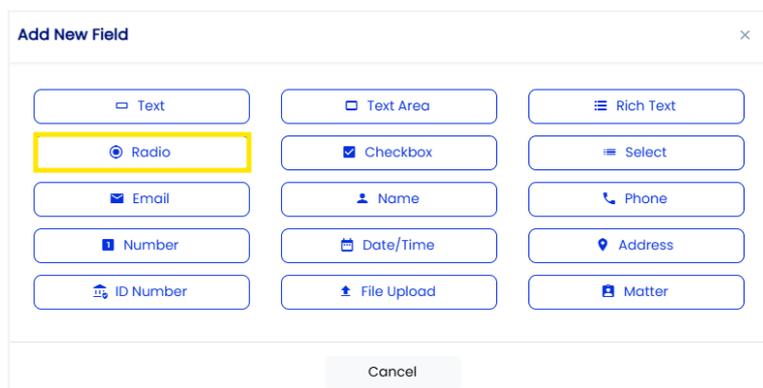
For example: The form may ask if the form filler is an individual or a company. If the answer is "company", the next question offered would be to ask for the company ABN or other identifier. If the answer is "individual", the form may present questions asking for their full name and date of birth. This branch in the line of questions is created by applying logic to the form fields.

To further explore how logic works, let's start by inserting a list of options. In this example, a radio button field will be created. Click **New Field**.

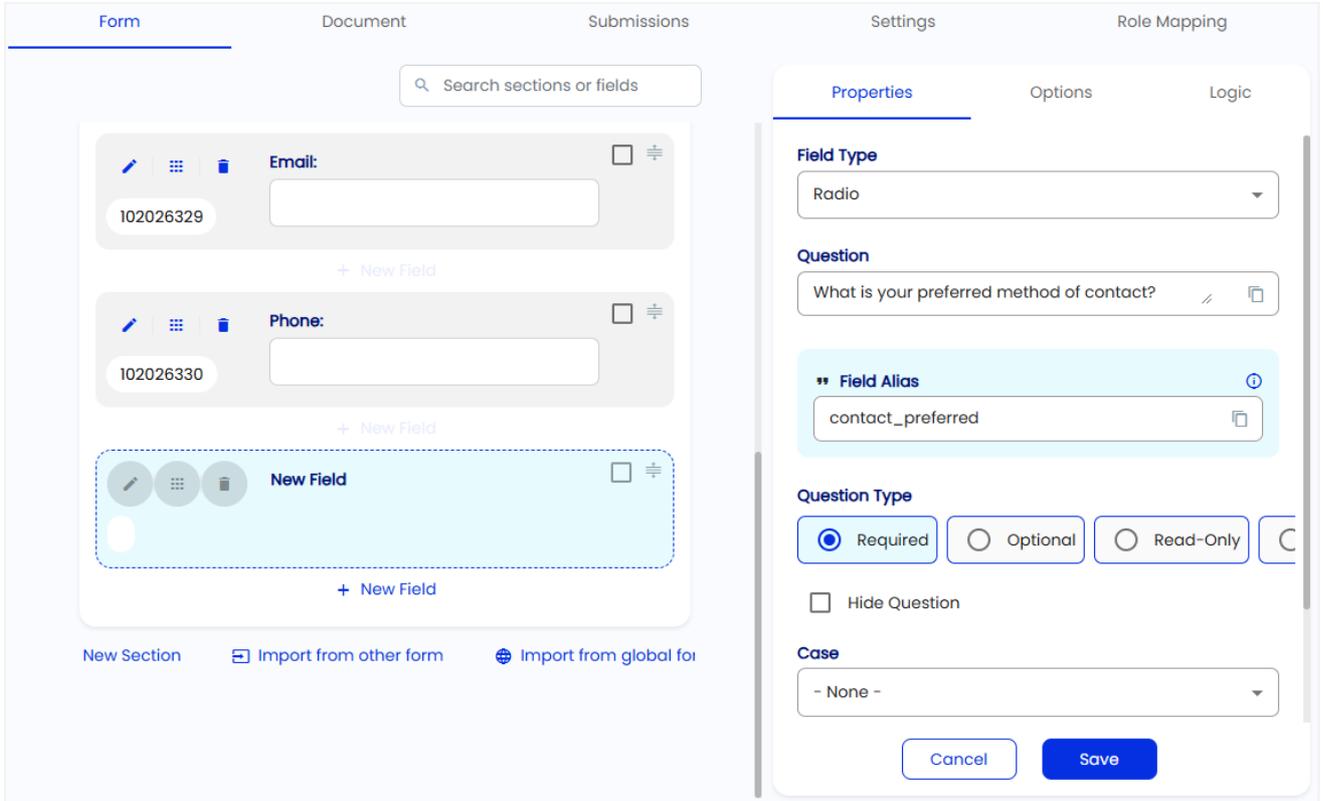


2.1 Radio Buttons

Radio buttons enable a single selection response. To add a radio button to a form, select **Radio** from the list of field types.



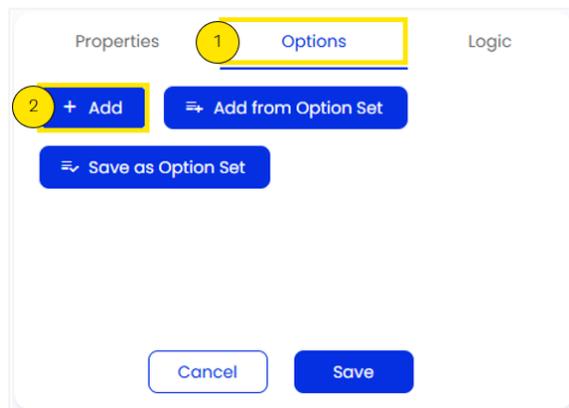
In this example, the question is: What is your preferred method of contact? The question requires a response from the form filler, so the **Question Type** is set to **Required**.



The screenshot shows the Smarter Drafter interface. On the left, the 'Form' tab is active, displaying a form with three fields: 'Email' (ID: 102026329), 'Phone' (ID: 102026330), and a 'New Field'. On the right, the 'Settings' panel is open, showing the 'Properties' tab. The 'Field Type' is set to 'Radio'. The 'Question' text is 'What is your preferred method of contact?'. The 'Field Alias' is 'contact_preferred'. The 'Question Type' is set to 'Required'. The 'Case' is set to '- None -'. There are 'Cancel' and 'Save' buttons at the bottom of the settings panel.

We'll now add list options.

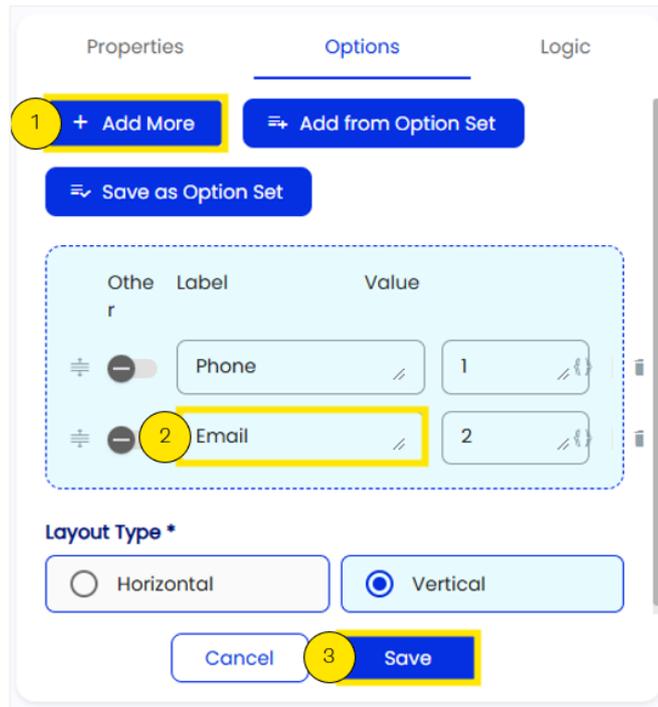
1. Click the **Options** tab on the field.
2. Click **Add** to add an option to the range.



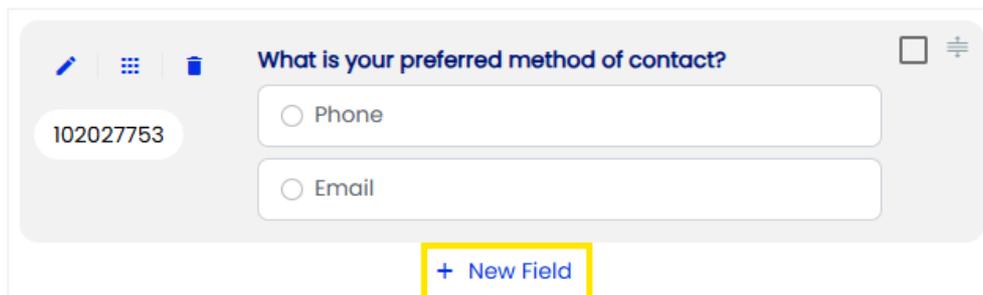
The screenshot shows the 'Options' tab for a field in the Smarter Drafter interface. The 'Options' tab is highlighted with a yellow box and a yellow circle with the number '1'. Below the tab, there are three buttons: '+ Add' (highlighted with a yellow box and a yellow circle with the number '2'), 'Add from Option Set', and 'Save as Option Set'. At the bottom, there are 'Cancel' and 'Save' buttons.

The **labels editor** opens.

1. Click **Add More** to add options to the range.
2. Type a unique label for each option.
3. Click Save when the list is complete.



This is what the completed field looks like.

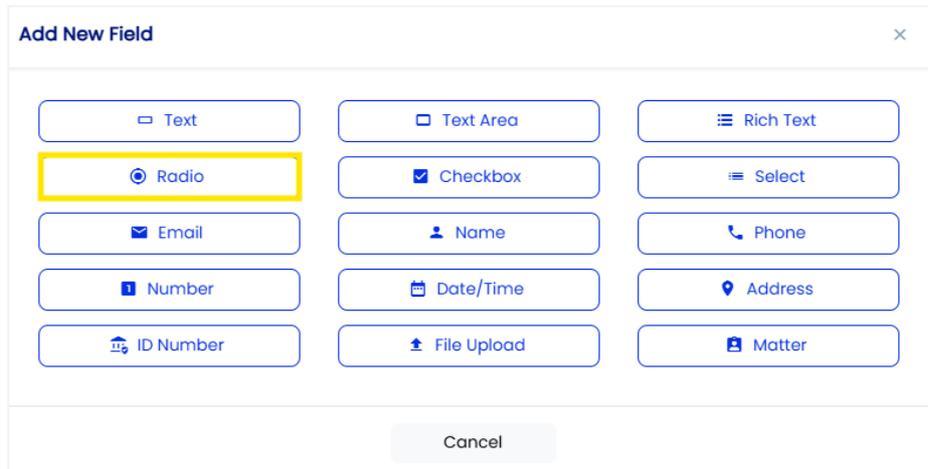


In this example, another field will be added, but the form filler will only see it if they select "Phone". To do this, logic will be applied to the new field. The next step is Click **New Field**, below the named range.

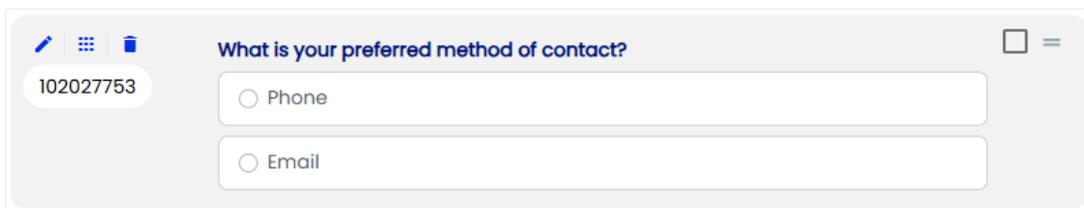
2.2 Using Logic with a List

By applying logic, we can reduce the questions that are presented to the form filler, so they are only shown the questions that are relevant.

Let's add a new question, to find out how the form filler would like to be contacted. Add a radio button list above the fields for phone number and email address.



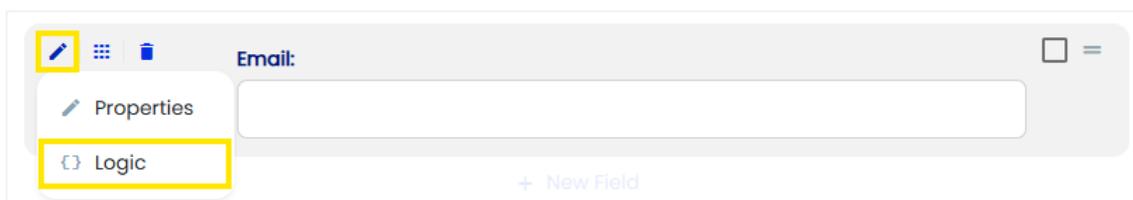
The radio button list will be constructed as follows:



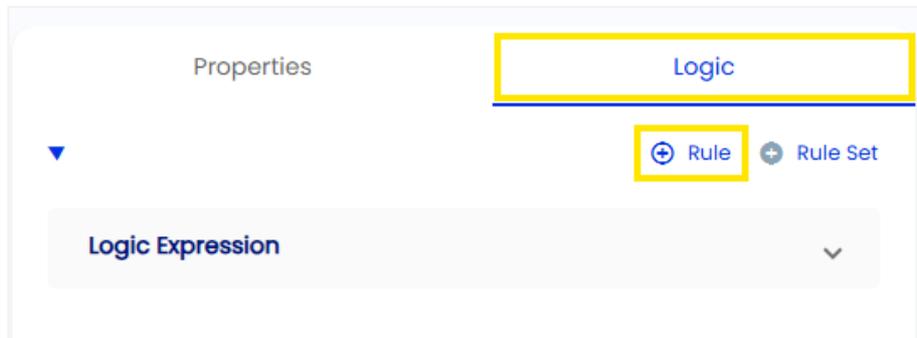
With this question in the form, we can add logic to the Phone Number and Email fields. Depending on the answer the question above, the form filler will be asked for the contact details that are relevant.

On the Email field:

1. Click the pencil shaped edit button
2. Click Logic.

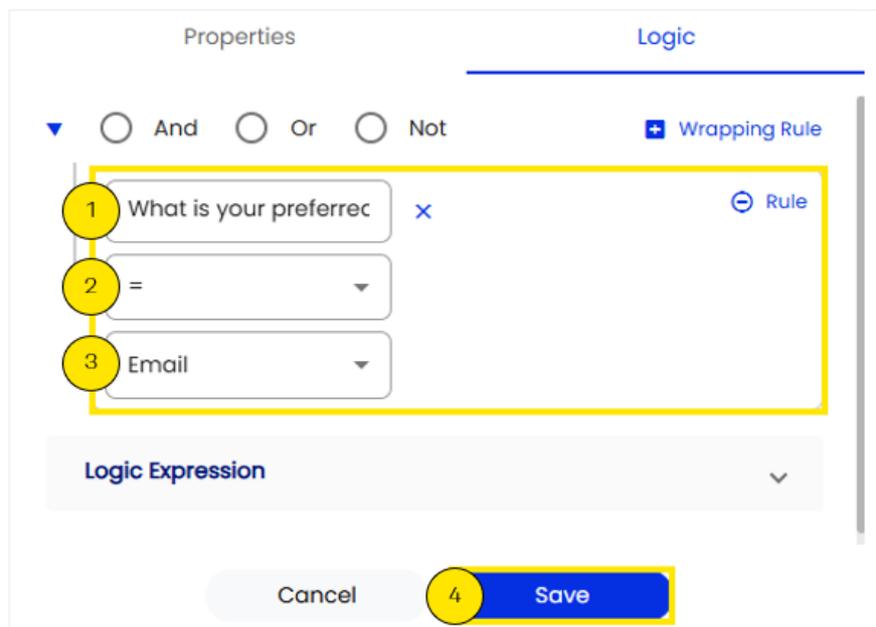


1. The **Logic** editor opens (it's the tab next to the **Properties** editor).
2. Click the **Add Rule** button.



Use the drop-down lists to apply logic:

1. Select the **question** this field depends on.
2. Select the **operator**. In this example, it's "equal to", or the equal sign.
3. Select **Email**.
4. Click **Save**.



We will now repeat the process to apply logic to the **Phone** field.

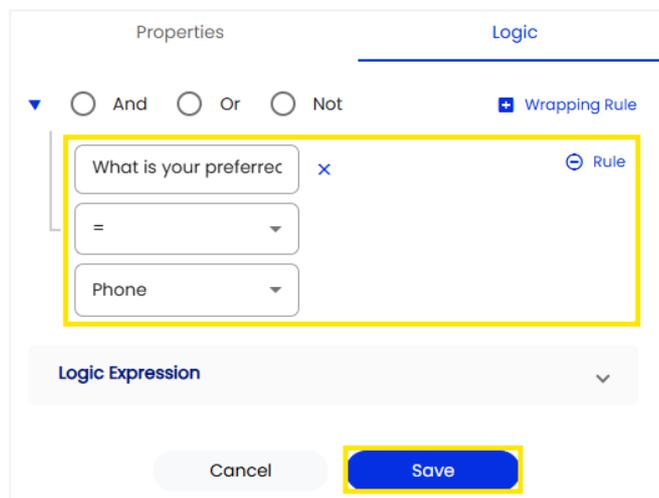
1. Click the **edit** button.

2. Click Logic.



A screenshot of the Smarter Drafter interface. At the top, there is a header bar with a pencil icon, a grid icon, and a trash icon. Below this is a 'Phone:' label followed by an empty text input field. A '+ New Field' button is located below the input field. On the left side, there is a vertical menu with 'Properties' and 'Logic' options. The 'Logic' option is highlighted with a yellow box.

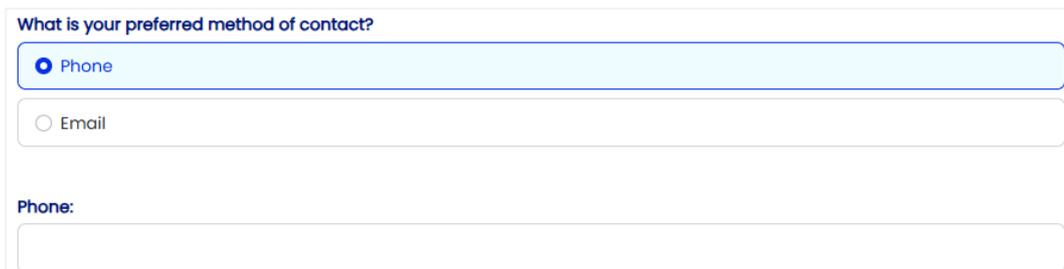
Apply **Logic** as follows, using the same principles as used for the email field, and **Save**.



A screenshot of the Logic configuration dialog box. The 'Logic' tab is active. At the top, there are radio buttons for 'And', 'Or', and 'Not', and a '+ Wrapping Rule' button. Below this is a rule configuration area with a yellow border. It contains a text input field with 'What is your preferred method of contact?', followed by an equals sign in a dropdown menu, and another dropdown menu with 'Phone'. Below the rule configuration is a 'Logic Expression' dropdown menu. At the bottom, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a yellow box.

2.3 Finished Product

With logic, the form appears smart. A form filler who prefers to be contacted by phone will be asked to enter their phone number.



A screenshot of the finished form. It starts with the question 'What is your preferred method of contact?'. Below this are two radio buttons: 'Phone' (which is selected) and 'Email'. Below the radio buttons is a 'Phone:' label followed by an empty text input field.

If they select email, they will not be asked for their email address.

What is your preferred method of contact?

Phone

Email

Email:

2.4 Checkboxes

Like radio buttons, checkboxes are fields that provide a list of options, though checkboxes allow for multiple selections. To create checkboxes, select the **Checkbox** field type:

Add New Field ×

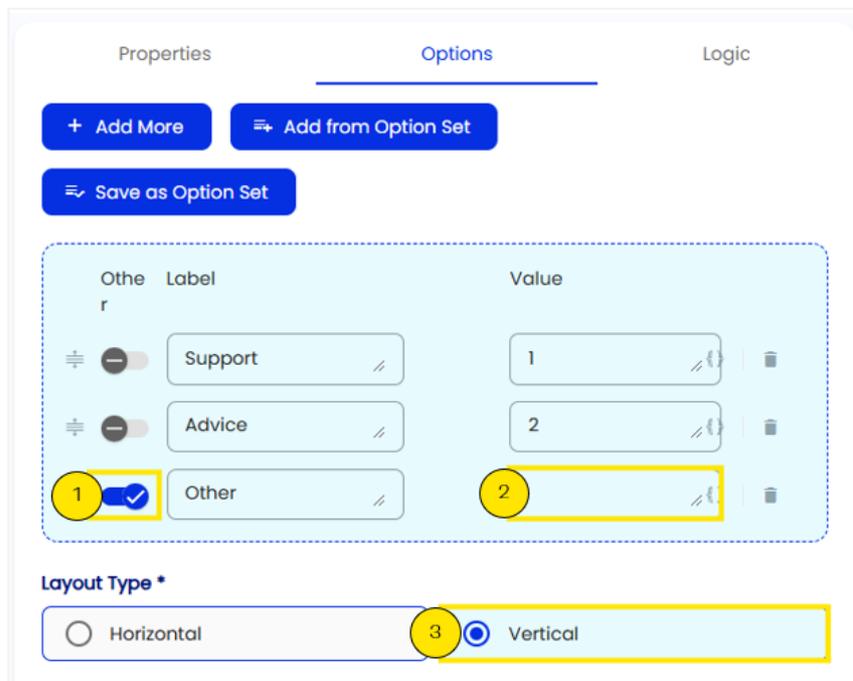
<input type="checkbox"/> Text	<input type="checkbox"/> Text Area	<input type="checkbox"/> Rich Text
<input checked="" type="radio"/> Radio	<input checked="" type="checkbox"/> Checkbox	<input type="checkbox"/> Select
<input type="checkbox"/> Email	<input type="checkbox"/> Name	<input type="checkbox"/> Phone
<input type="checkbox"/> Number	<input type="checkbox"/> Date/Time	<input type="checkbox"/> Address
<input type="checkbox"/> ID Number	<input type="checkbox"/> File Upload	<input type="checkbox"/> Matter

Editing the options in a list of checkboxes is the same process as used for radio buttons, above.

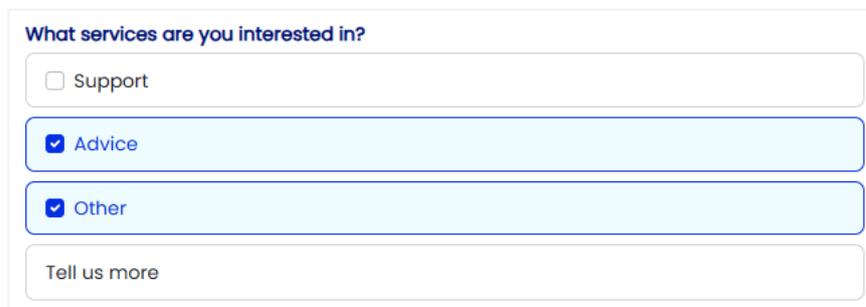
2.5 Gathering Additional Information

In all lists of options, there is a slider to assign an **Other** option. This gives the form filler the opportunity to write in an answer if the answer that they need to provide is not available in the list. Toggle the slider on to set a list option as **Other**. When the form filler selects this option, it will open a text field for them to add their answer.

1. To set the **Other** option, toggle the slider as shown.
2. The **Value** is the text that will appear in the **Other** text field when it appears. It may be something like, "Tell us more", which prompts the form filler to give further information.
3. **Vertical** and **Horizontal** options relate to how the list options are displayed. Vertical layout will create a vertical list.

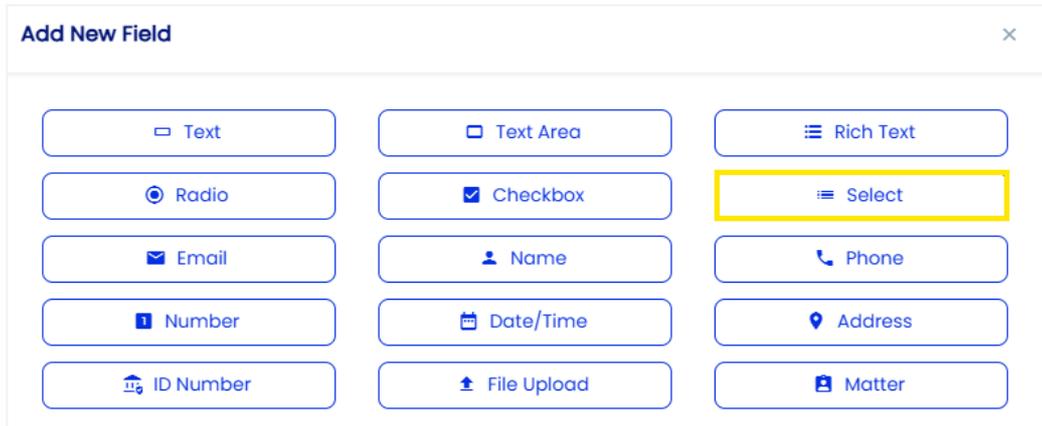


This is the finished product of the checkbox field created above. Multiple options can be selected and since Other is selected, a field has appeared to capture more information.

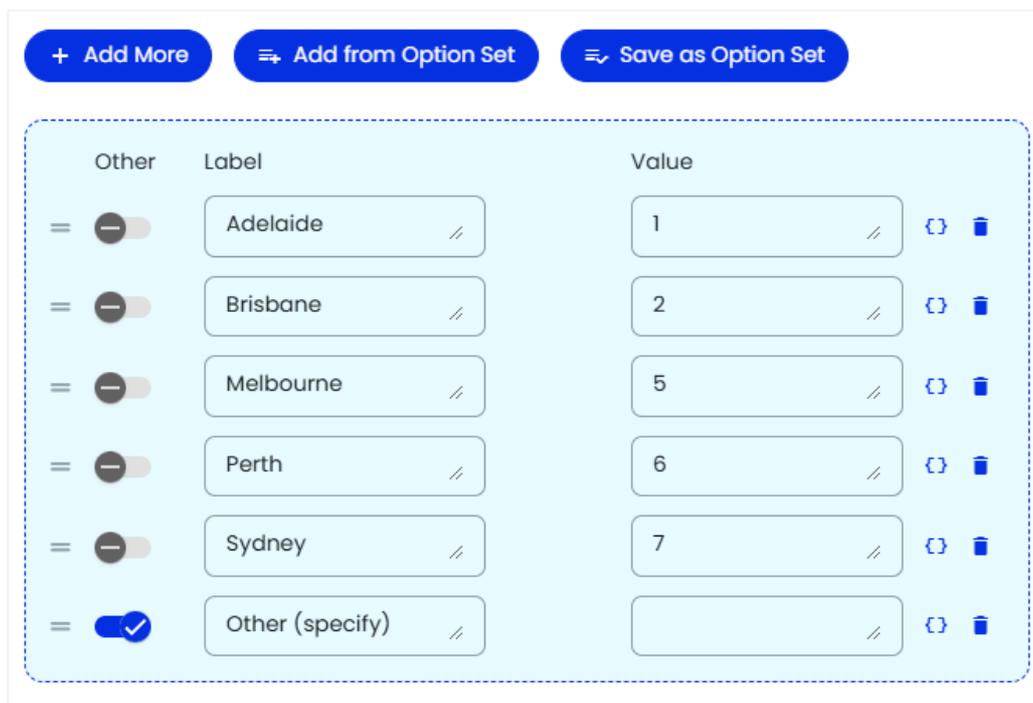


2.6 Select Fields

A select field is a list of options that appear in a drop-down list. Only one option can be selected in this type of field. A select field is preferable to a radio button field where you wish to make a large number of options available for selection, to avoid all the options showing in the form at once. To add a select field, click **Select** in the field type.



For example, a longer list of locations may be presented as follows:



The finished selection field would look like this:

Select your location:

- Adelaide
- Brisbane
- Melbourne
- Perth
- Sydney
- Other (specify)

The text field to request further information would be revealed if the 'other' enabled option was selected.

Select your location:

Other (specify)

3. Setting up the Word Template

In your Word document, you can output the option selected as with any other type of field. Simply use the Add button of the to drop the data field into the document template.

Personal details ^

 Name: ADD ⋮

 Address: ADD ⋮

 Date of birth: ADD ⋮

 Day of birth: ADD ⋮

 Select your location: ADD ⋮

Location:



Either the option selected will be entered, or if Other is selected, the typed response will be entered into the final document.