



Create a Simple Form

Help Guide

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1. Forms

A form is a powerful tool to capture data. When presented as a finished product, a form is a set of questions or prompts, with features that a person can interact with to share responses.

1.1 Form Features

A form is built by assembling form **sections** and **fields**.

A form section is used to group fields under a heading. Form fields are the building blocks of online forms. Fields let you collect data from people who fill in the form. There are many types of fields, which can be implemented creatively to meet unique needs.

The interactive features of a form can be:

- Text fields (for typed entries).
- Radio buttons (to capture a single correct response from a list of many).
- Checkboxes (to capture multiple responses from a range of possible responses).
- Date fields
- Phone numbers
- Email addresses

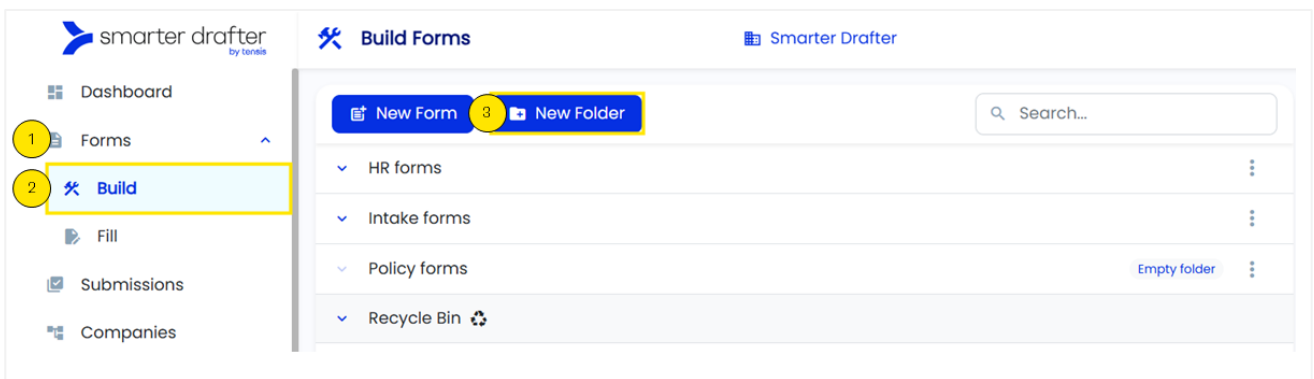
1.2 Using Folders

Forms are organised in folder structures within the Smarter Drafter Web Application.

To save a new form, you must find an appropriate place to save the form. It's necessary to understand the folder structure in use in your organisation, and follow naming conventions.

If you need to create a new folder, follow these steps:

1. Click Forms
2. Click Build
3. Click New Folder



Give the folder a name (in this example, the folder is called "Agreements").

- If the folder sits at the root layer (like this one) leave the **Folder** field blank. If the folder needs to be nested in another folder, Click the Folder field and select the required folder in the drop down list.
- Click **Save**.

Add New Folder
✕

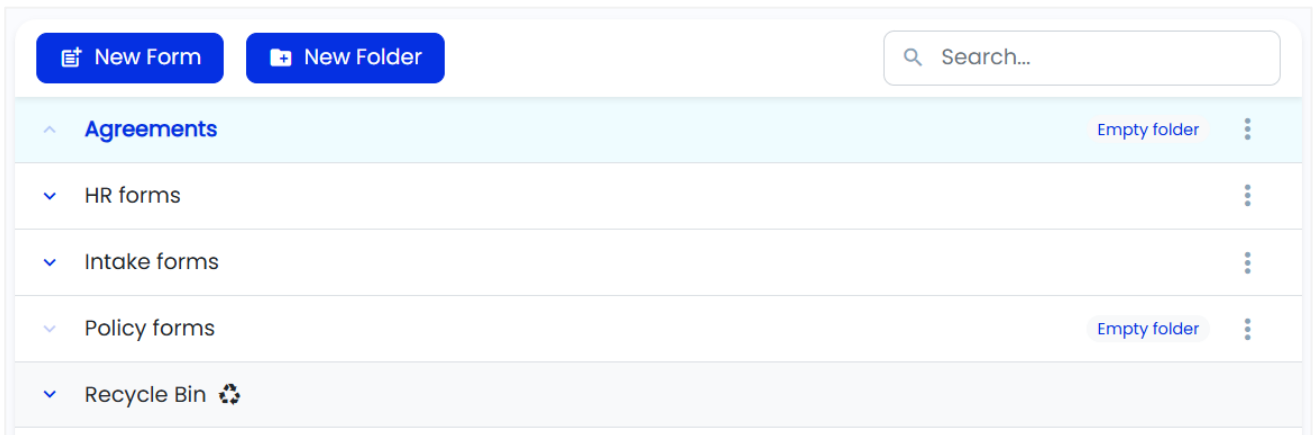
Name *

Folder

Description

Cancel
Save

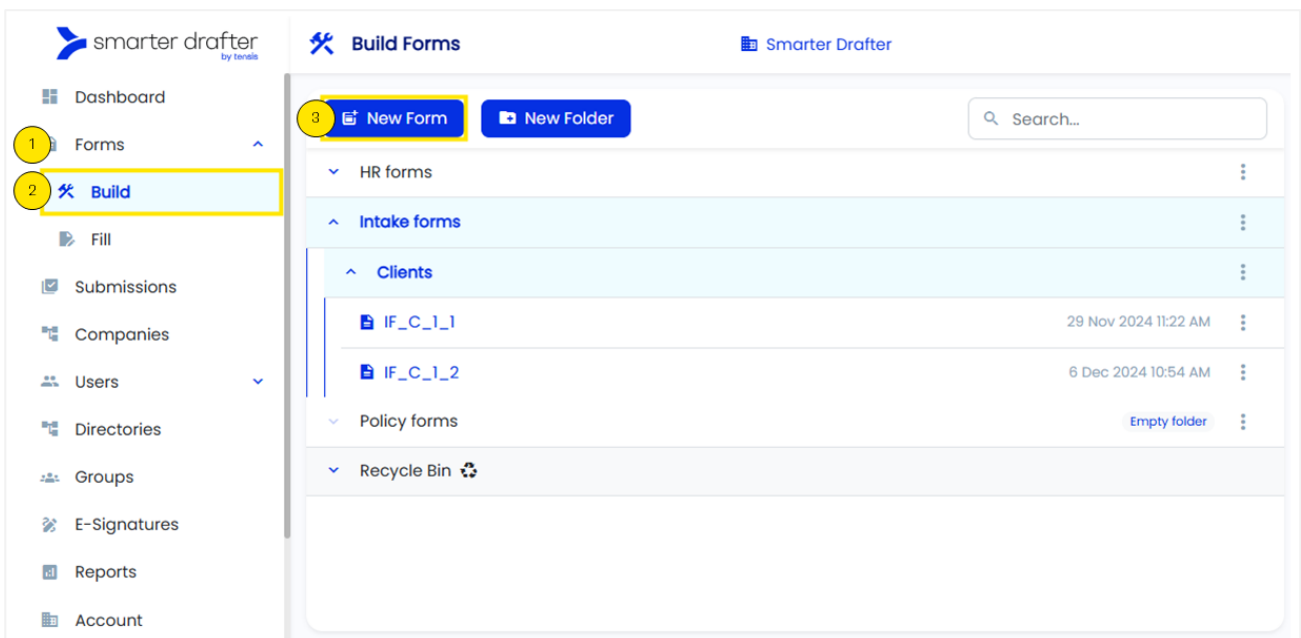
The newly created folder is in the list, highlighted blue.



1.3 Create a New Form

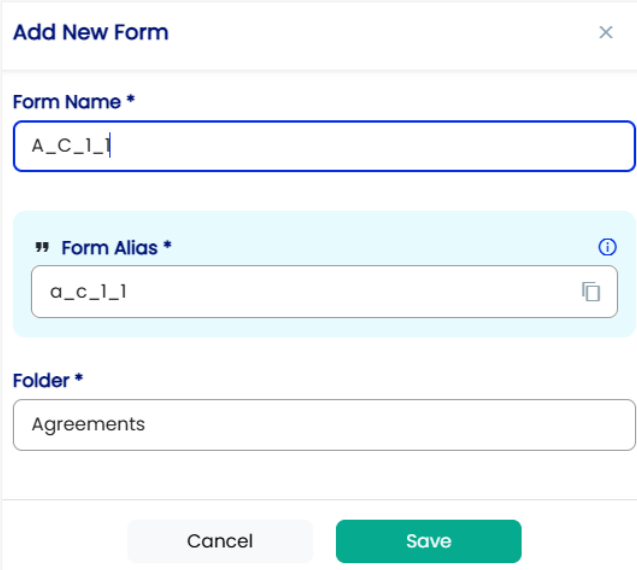
To create a new form, follow these steps:

1. Click Forms
2. Click Build
3. Click New Form



The Add New Form pop up appears.

- Create a **Form Name**. It must align with the naming convention in use in your organisation.
- Create a **Form Alias**. This will be used to share data across forms.
- Select the required **Folder** in which to save the form.
- Click **Save**.



Add New Form ×

Form Name *

A_c_1_1

Form Alias * ⓘ

a_c_1_1

Folder *

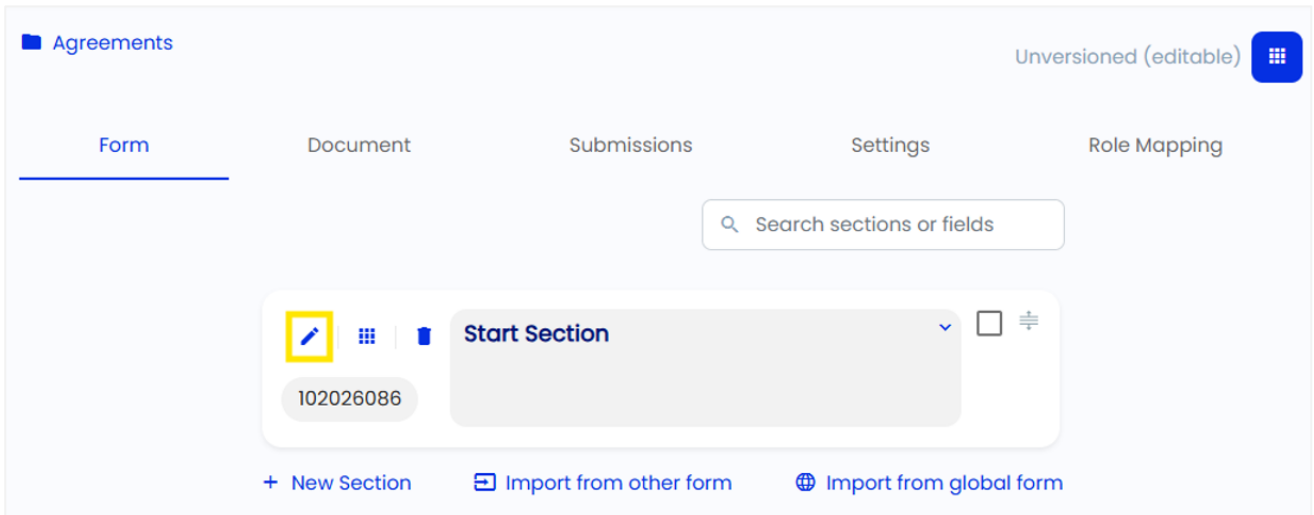
Agreements

Cancel Save

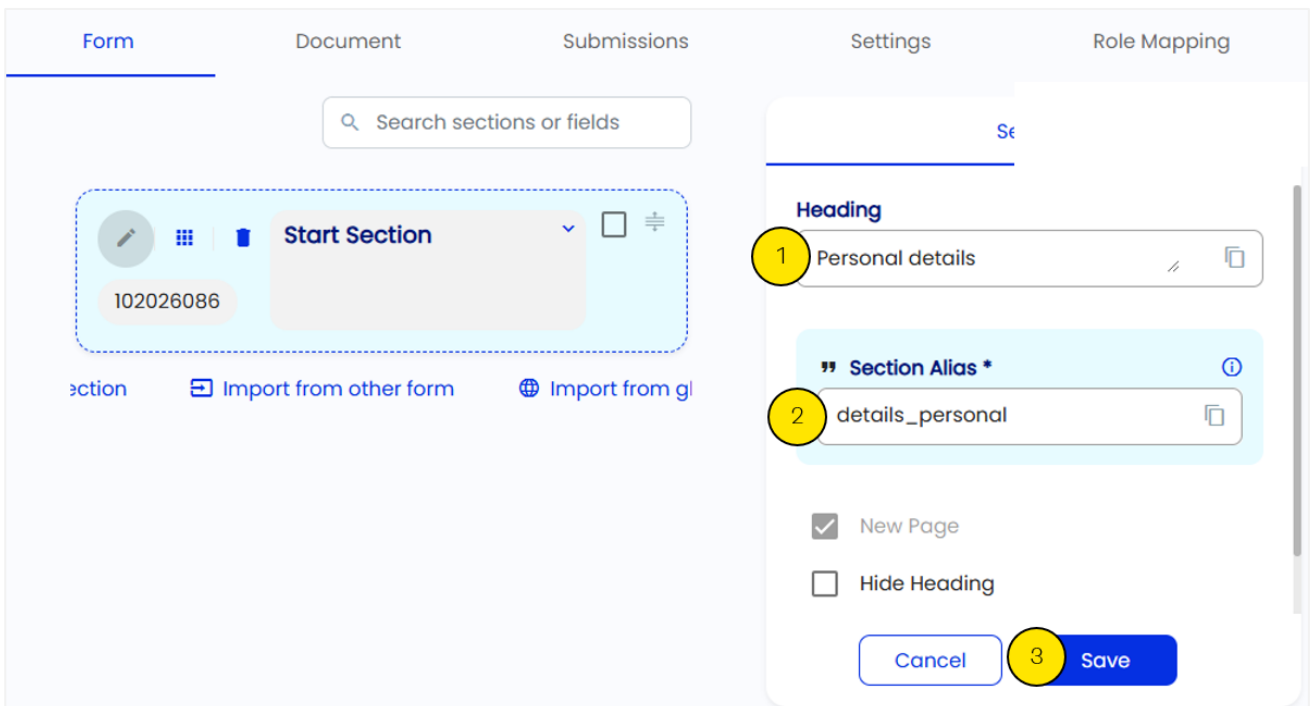
Note: Form names and form aliases must be unique.

1.4 The Form Builder

The Form Builder is now open. The first step is to name the first section. Click the pencil shaped **edit button** on the section.



1. Enter **Heading** details. In this example, the section relates to **Personal details**, so that is the heading.
2. A **Section Alias** is a label that can be applied to multiple forms, to enable data sharing across forms.
3. Click **Save** and **Close**.



Note: Always name the section before creating fields. If the section is not named first, your changes may not be saved later.

2. Using Fields

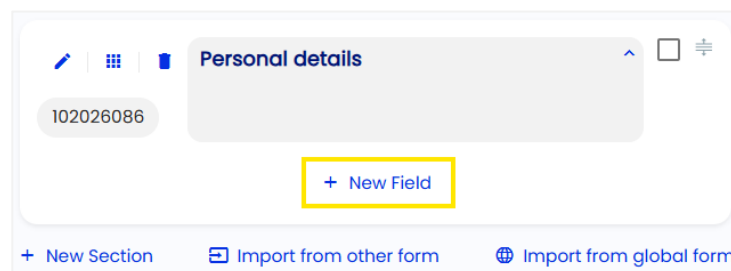
A form is made up of fields. There are many different field types, which will be explored.

All fields have properties that can be applied, modified or customised to meet unique needs.

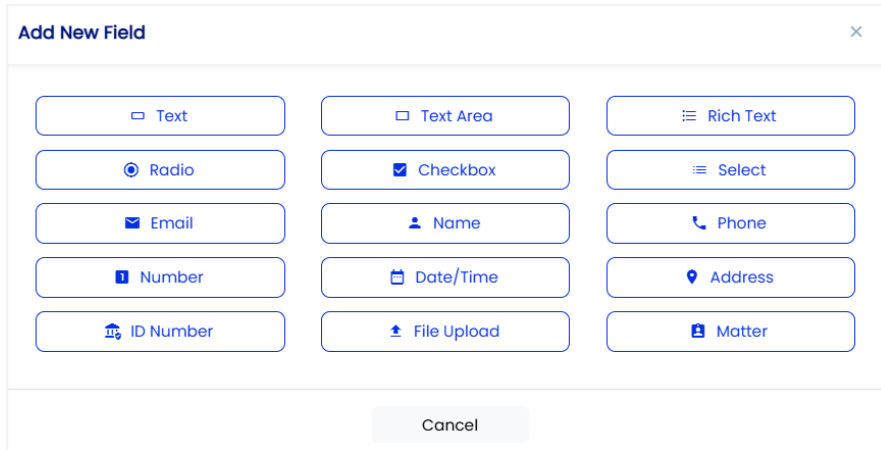
- **Required/Optional/Hidden/Read only:** This property determines if the form filler is required to enter data in the field, or simply has the option to enter data. Fields can be hidden where there's no value to the user, such as today's date. Read only is used for a data such as a calculation where you can show the user the outcome.
- **Case** setting determines the default case of a field. It affects entries as follows:
 - Using **none** in the case field ensure no autocorrection takes place.
 - **Title case** adds caps to all main words, excluding minor words).
 - **Lowercase** corrects all letters to lowercase.
 - **Uppercase** makes all letters uppercase.
- A **Default Value** allows you to place a value in a field to appear to the user.

2.1 Add Fields

In this example, a simple form will be built. To add a field to the form, click **New Field** under the section.

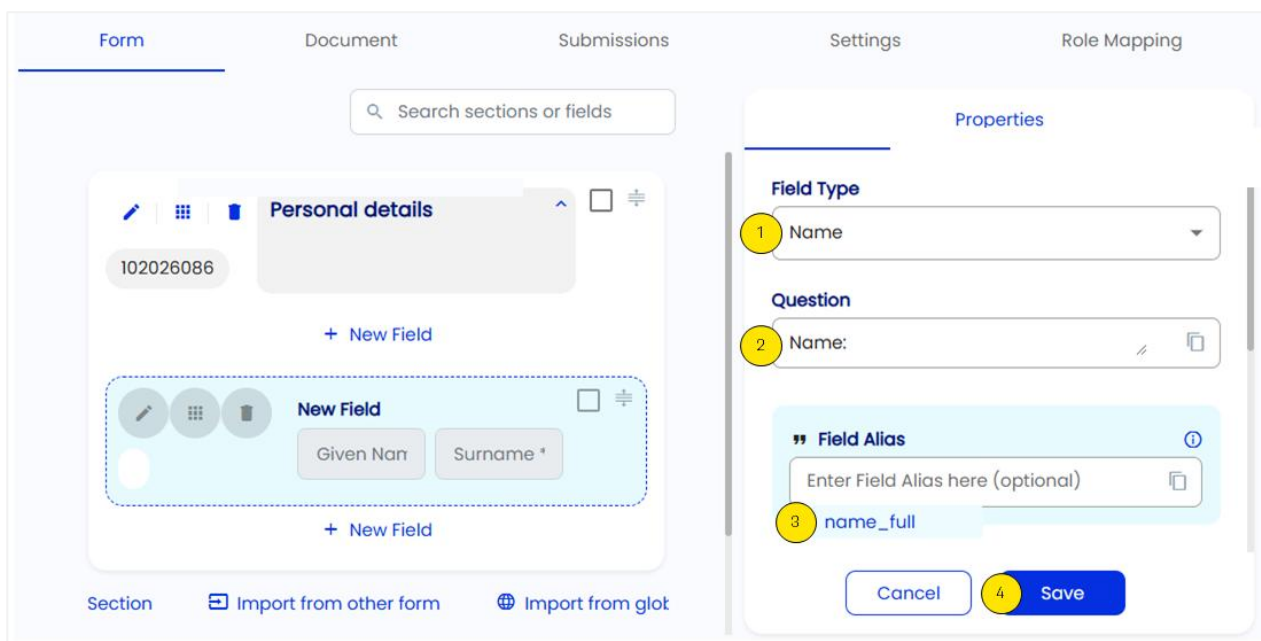


A pop up opens, offering a range of field types. In this example, a **Name** is the first field we will use. Click the required button.



2.2 Add a Name

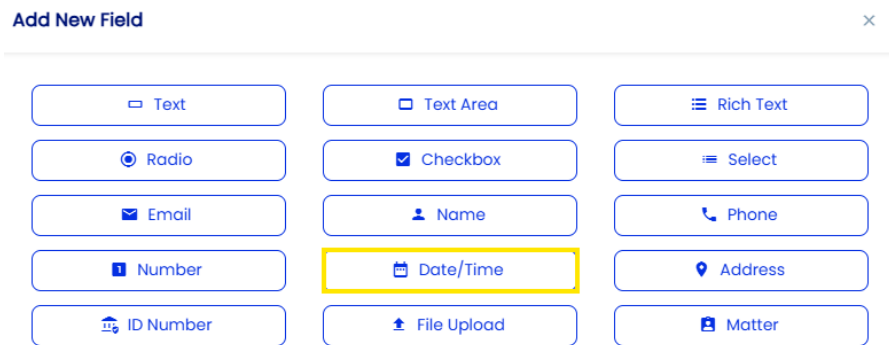
1. If you wish to change the field type, use the drop-down menu to make a new selection.
2. The **Question** is the text that appears beside the field. It's often a prompt to help the form filler enter the correct details in the form.
3. Enter a **Field Alias**. Smarter Drafter may deliver a prompt, if there is a field alias in use that matches the field type. In this example, "name_full" is the field alias associated with names.
4. Under **Case**, select "none". Doing this will prevent Smarter Drafter from correcting the case on an entry.
5. Click **Save** and **Close**.



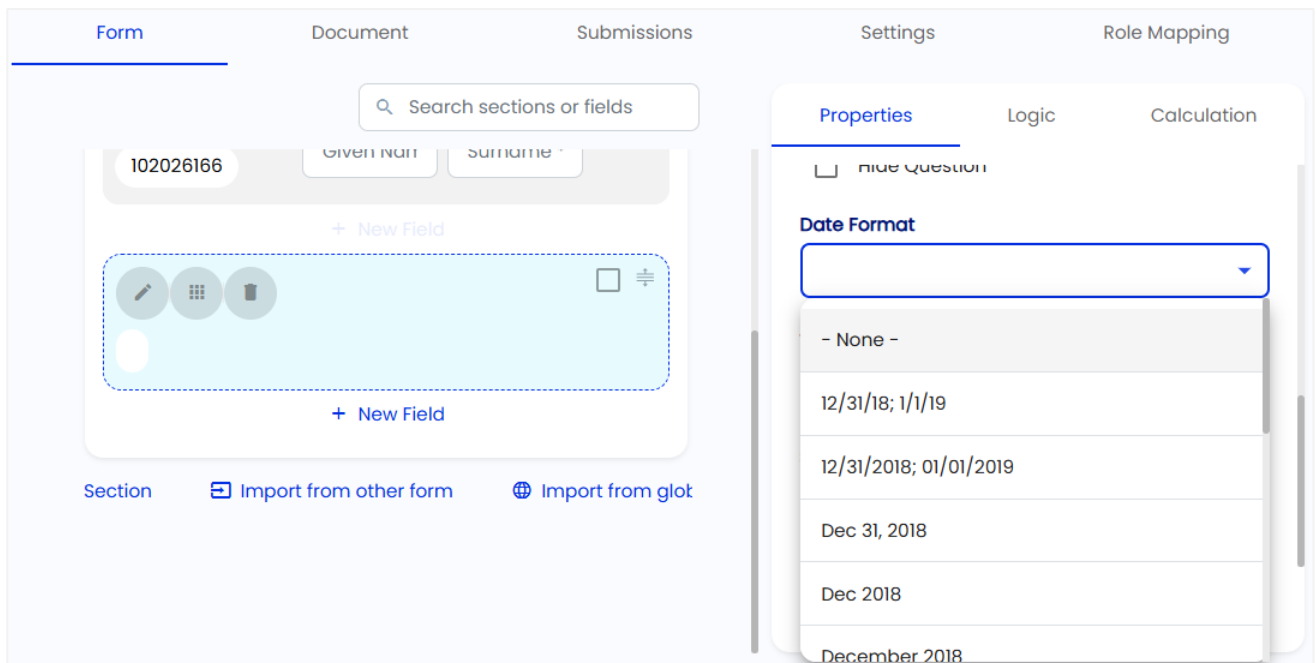
2.3 Add a Date of Birth

A date of birth field can be created in a similar way to a name field. Follow these steps:

1. Click **New Field** and select **Date/Time**.



2. Determine if the question is **required** or **optional** and select the relevant radio button.
3. Add a **Question** and **Field Alias** (similar to the process used above in the name field).
4. Scroll down and select a **Date Format** to display.



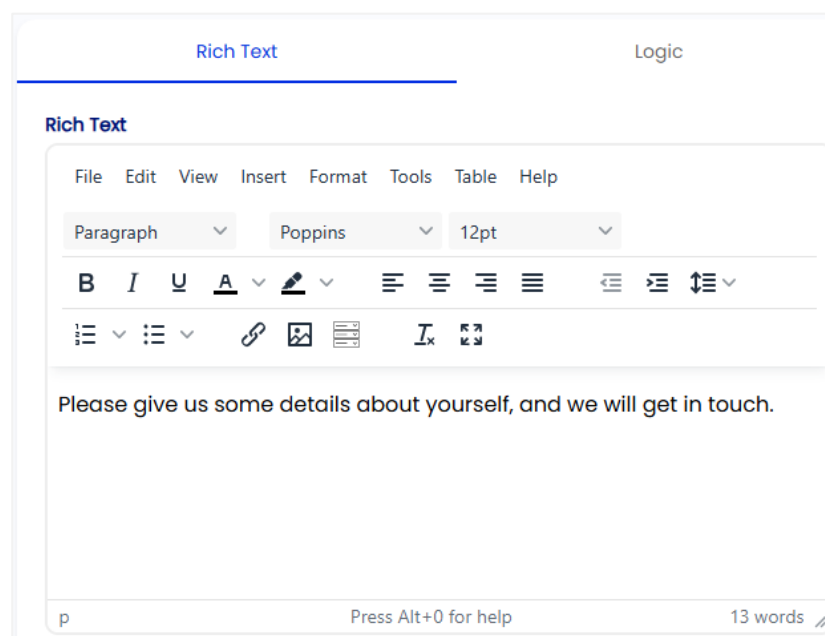
2.4 Email and Phone Number Fields

These field types have simple properties that we have already covered. We will now add them to the form, making both required.

2.5 Rich Text

A rich text field allows you to place a message in the form. It may be used to give instructions, ask longer questions, or give explanations. Rich text can be formatted with font style and size.

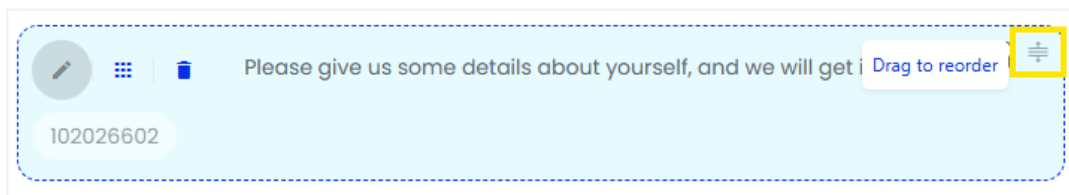
Simply add a field and select **Rich Text**. Type a message and format the text in the editor. Click Save.



3. Organising the form

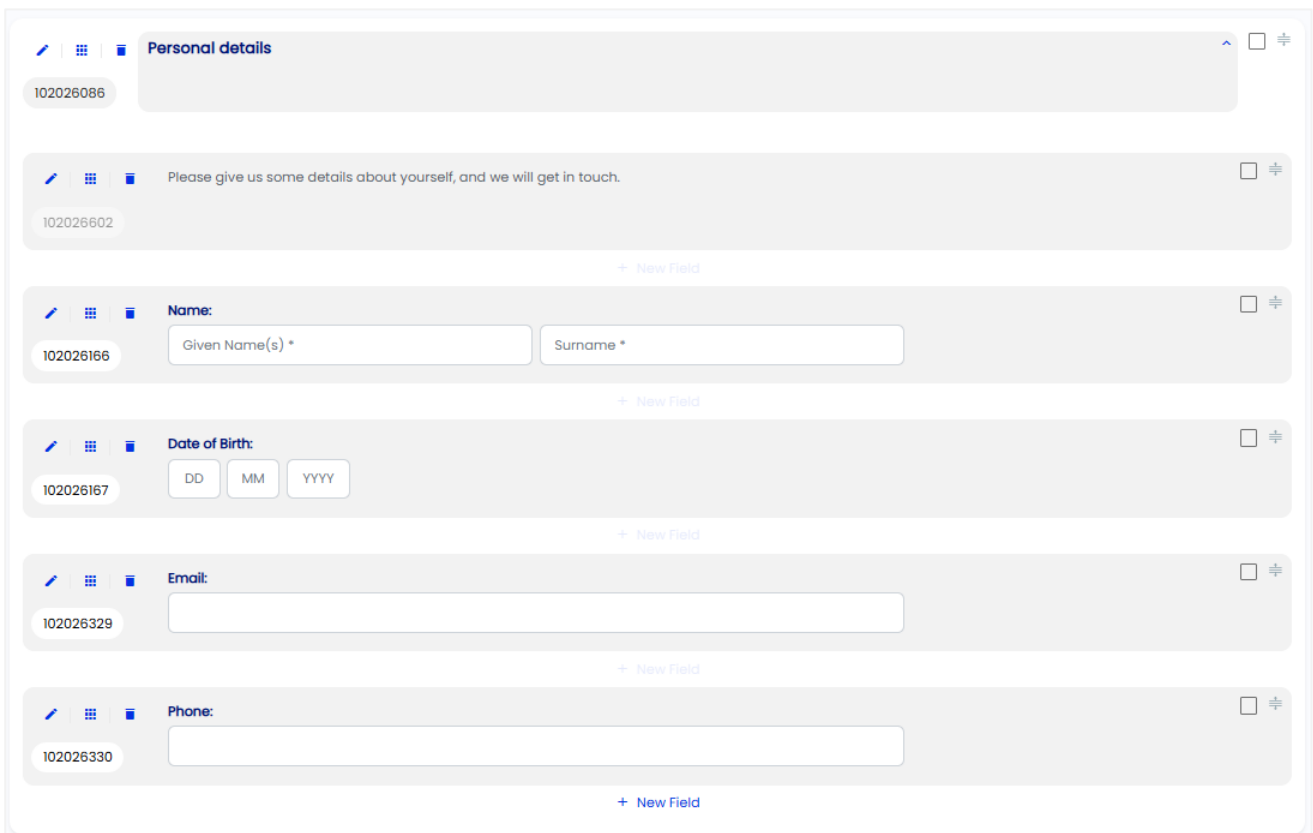
To rearrange the order of the fields, use the reorder buttons on the right of the field in the form builder. This allows the field to be moved up or down in the form.

This rich text field, giving instructions to the form filler, can be moved to the top, even though it was added last.



4. The Completed Form

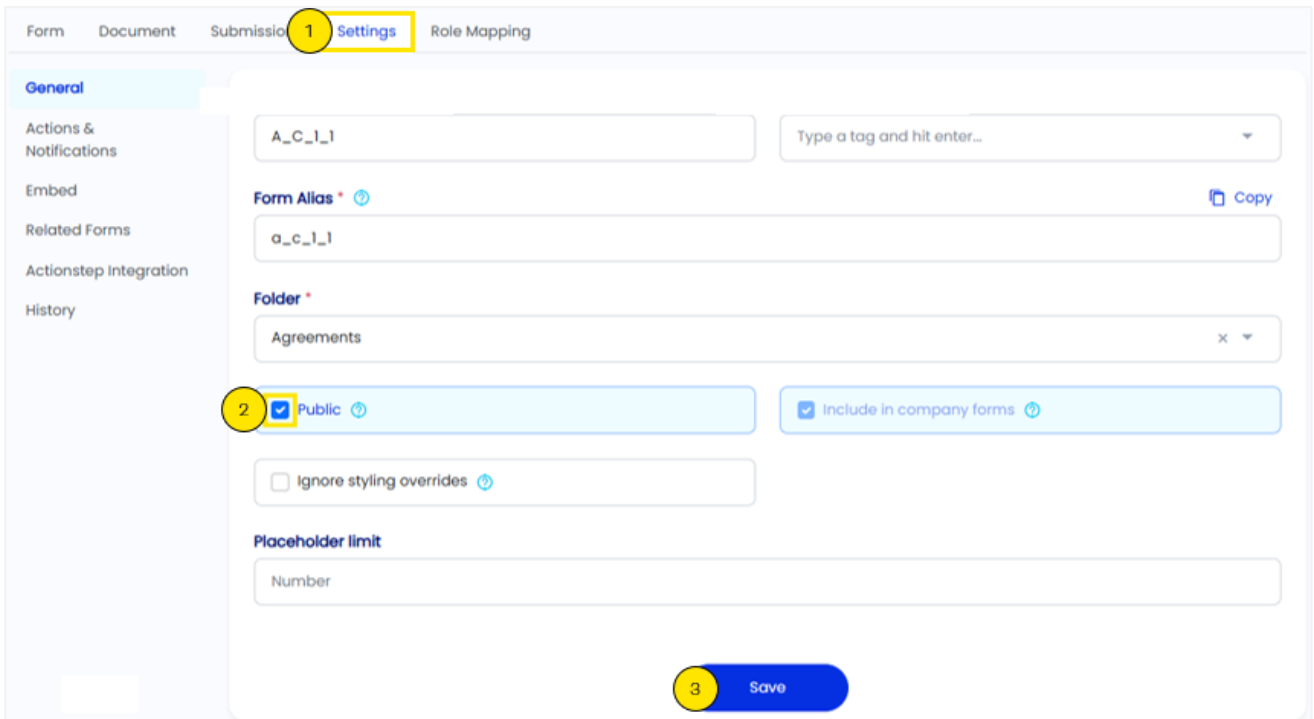
The form created in this example looks like this:

A screenshot of a completed form. The form is titled "Personal details" and contains several sections. The first section is "Personal details" with a text input field containing "102026086". The second section is a rich text field with the text "Please give us some details about yourself, and we will get in touch." and a text input field containing "102026602". The third section is "Name:" with two text input fields: "Given Name(s) *" and "Surname *". The fourth section is "Date of Birth:" with three dropdown menus labeled "DD", "MM", and "YYYY". The fifth section is "Email:" with a text input field. The sixth section is "Phone:" with a text input field. Each section has a "+ New Field" button below it.

4.1 Publishing a Form

In the Form Builder:

1. Click the **Settings** tab.
2. There is a checkbox under Settings to set a document to **Public**. Users will only be able to see a document in your forms list if this **box is ticked**. If you need to take a document offline, untick the **Public** box.
3. Click **Save** to complete the publishing process.



The screenshot shows the 'Settings' tab in the Smarter Drafter Form Builder. The 'Settings' tab is highlighted with a yellow circle and the number 1. The 'Public' checkbox is checked and highlighted with a yellow circle and the number 2. The 'Save' button is highlighted with a yellow circle and the number 3.

Form Document Submission **1 Settings** Role Mapping

General

Actions & Notifications

Embed



Related Forms

Actionstep Integration

History



A_C_1_1


Type a tag and hit enter...


Form Alias *   Copy


a_c_1_1

Folder *

Agreements  

2 **Public** 

Include in company forms 

Ignore styling overrides 

Placeholder limit

Number

3 Save