



smarter drafter **PRO**
by tensis

Create a Simple Template

Help Guide

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1. Templates

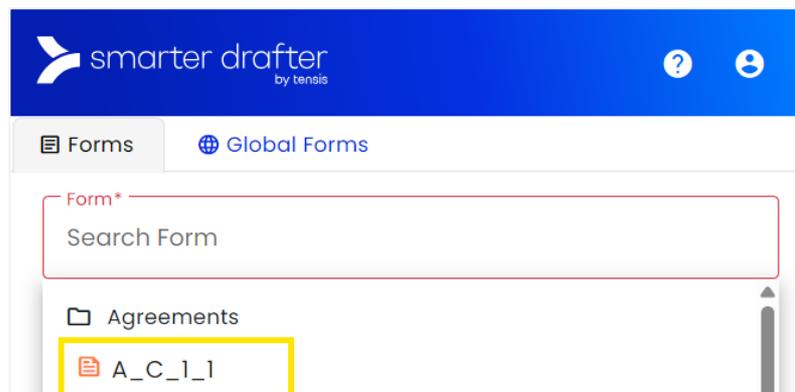
A **template** is the foundation of a document, created in Microsoft Word with the Smarter Drafter Add-In and design mode turned on.

To create a template, the Microsoft Word Smarter Drafter Add-In must be installed and enabled.

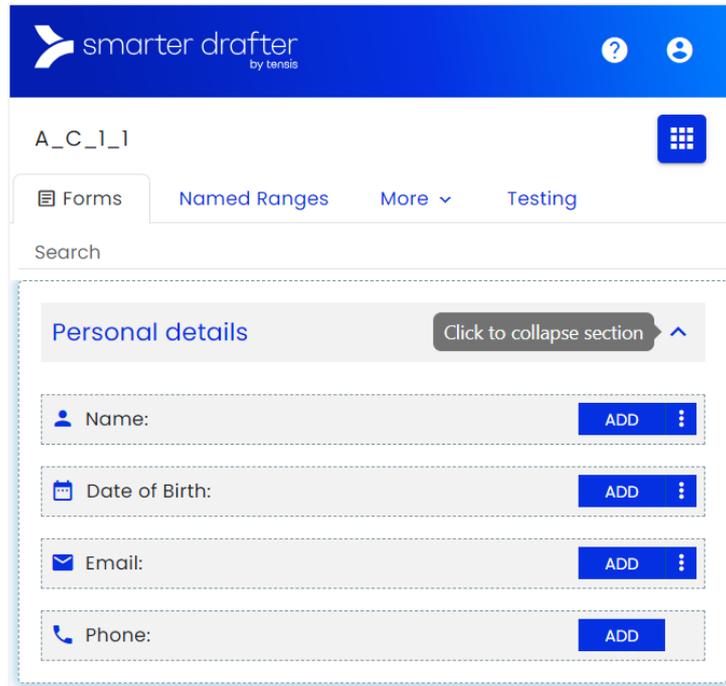
1.1 Creating a New Template

The steps to creating a template are simple, and once you have seen this example demonstrated, you will be on your way to automating documents.

1. Open Microsoft Word and open a new blank document.
2. Log in to the Microsoft Word Smarter Drafter Add-In.
3. Click the **Search Form** field in the Add-In.
4. Search the folders to find the form for which you want to create a template.
5. Click the form name (in this example, the form is called A_C_1_1).

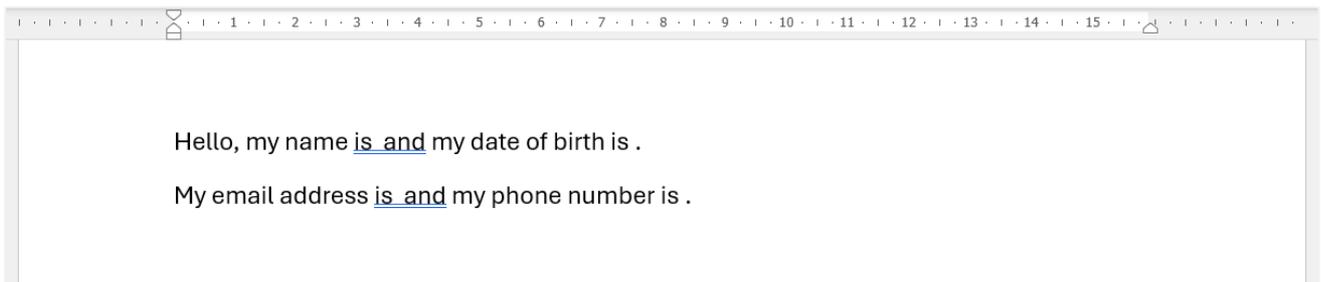


- The **Section heading** (in this example, the section is called "Personal details") appears. Click the drop-down arrow to show the fields.



The screenshot shows the Smarter Drafter interface. At the top, there's a blue header with the logo and 'smarter drafter by tensis'. Below the header, there's a navigation bar with 'Forms', 'Named Ranges', 'More', and 'Testing'. A search bar is present. The main content area shows a section titled 'Personal details' with a 'Click to collapse section' button and an upward arrow. Below this, there are four form fields: 'Name', 'Date of Birth', 'Email', and 'Phone'. Each field has an 'ADD' button and a vertical ellipsis menu icon.

- Write the document. In this example, the document is a simple note, ready to include the data points that are captured in the form.



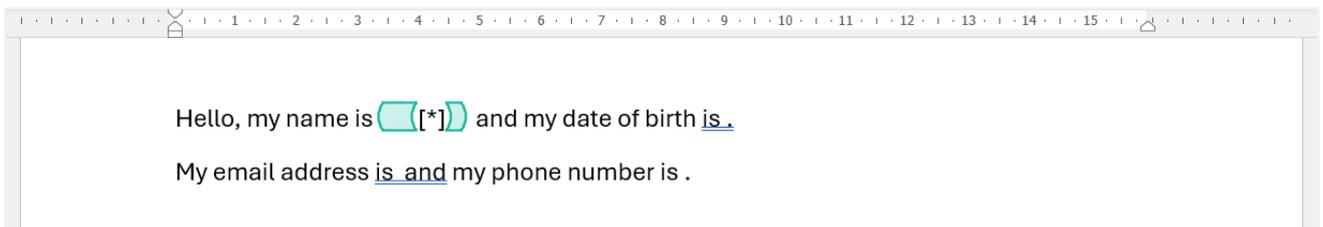
The screenshot shows a document editor with a ruler at the top. The document content is a simple note with two lines of text. The first line is 'Hello, my name is is_and and my date of birth is .' and the second line is 'My email address is is_and and my phone number is .'.

- To include a piece of field data, place the cursor in the spot where the data needs to be. For example: after "my name is", place the cursor.

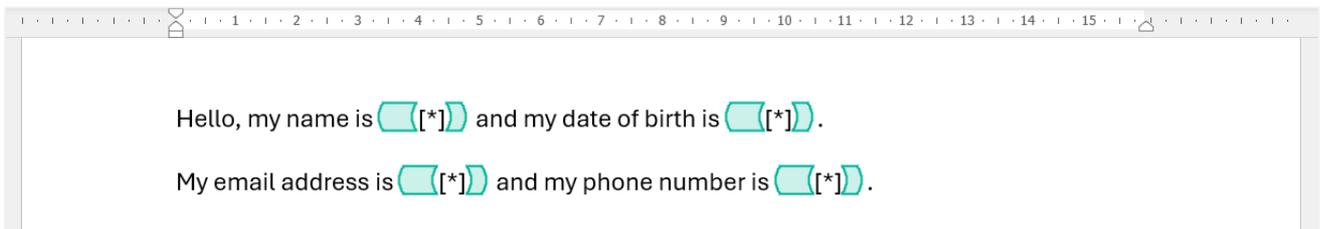
9. Now click the **ADD** button beside **Name** in the Microsoft Word Smarter Drafter Add-In.



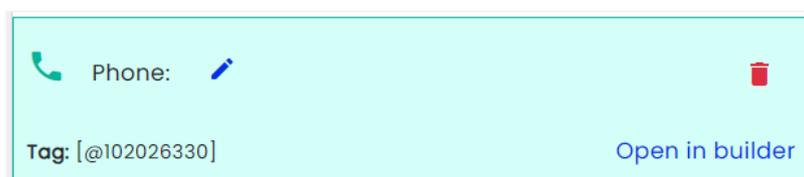
10. A symbol will be dropped in the template [*]. This indicates that the form data has been coded to appear in the document.



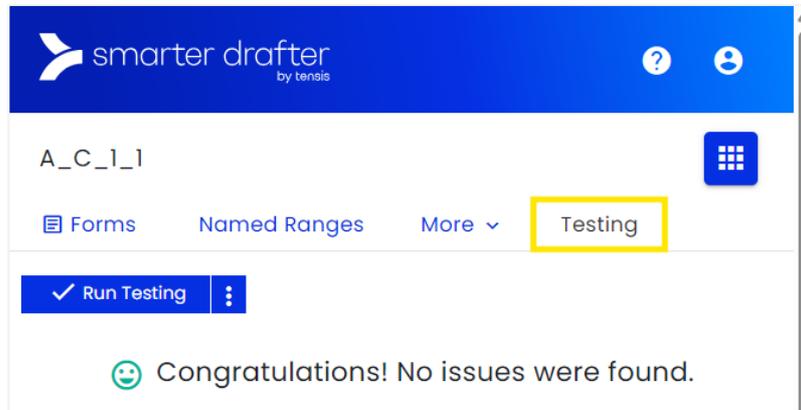
11. Repeat the step for all the data points in the document. The final result from the example is as follows:



12. When you click a [*] symbol, a green pop up appears in the bottom right corner of the Smarter Drafter Add-In, showing details about the data that has been included in the template and a link to open and edit the field in the builder.



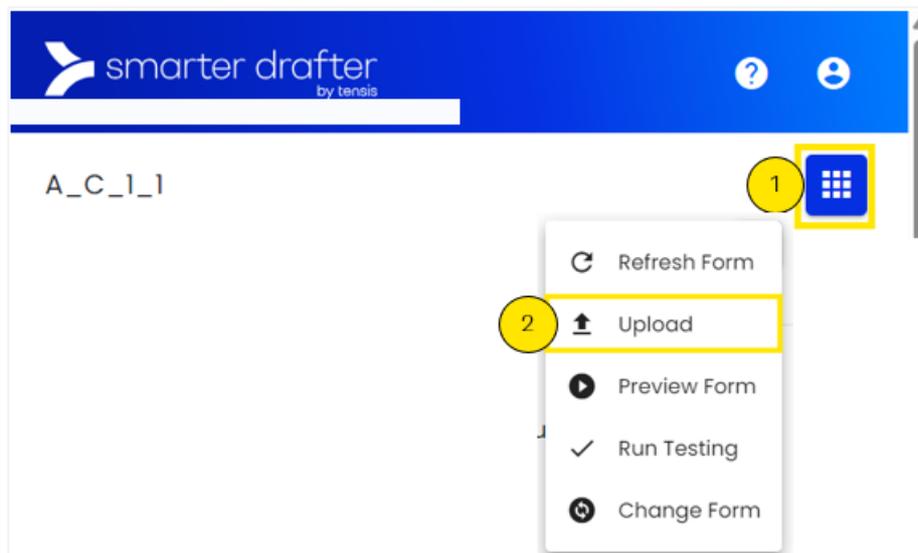
13. Run a test by clicking the **Testing** tab. If there are issues found, redo the previous steps.



2. Upload the Template

Save the template with a file name that aligns with your naming convention, then upload the file to the Smarter Drafter Web Application:

1. Click the **waffle button** in the MS Word Smarter Drafter Add-In.
2. Click **Upload**.



- The **Template Upload** pop up appears. Click **Add**, when prompted.

Template Upload

Filename: A_C_1_1.docx
Select a template to replace, or leave unselected to create a new one:

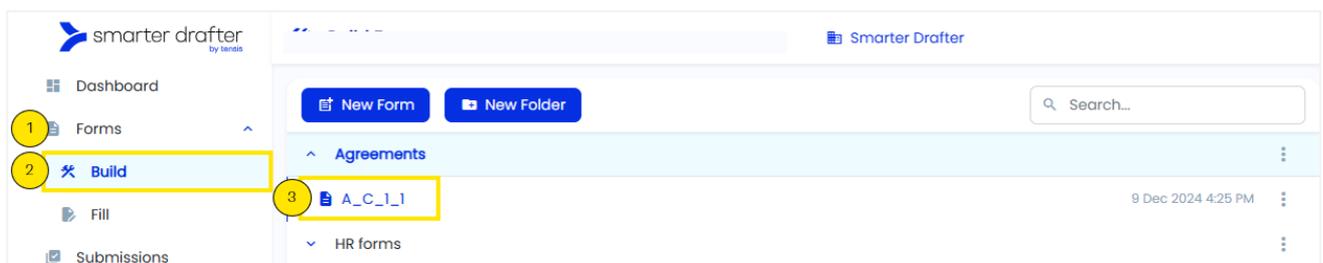
Name	Uploaded Filename	Action
A_C_1_1	A_C_1_1.docx	<input type="radio"/>

3
Add
Cancel

3. Open the Smarter Drafter Web App

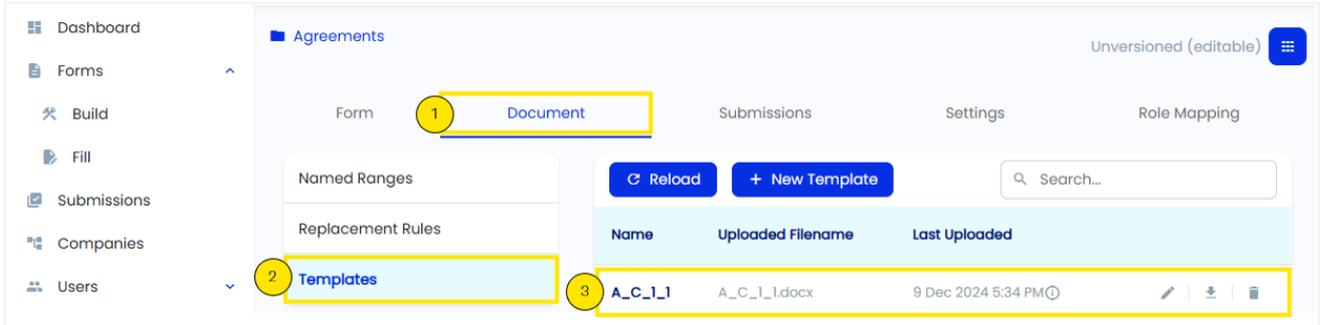
Find the form you are working on in the **Form Builder**.

- Click **Forms**.
- Click **Build**.
- Locate the form** in the folder where it was saved. Here is the form from the example:



Check that the template is successfully uploaded. To locate the template that was just uploaded:

- Click the **Document** tab.
- Click **Templates**.
- The template is found in the collection.

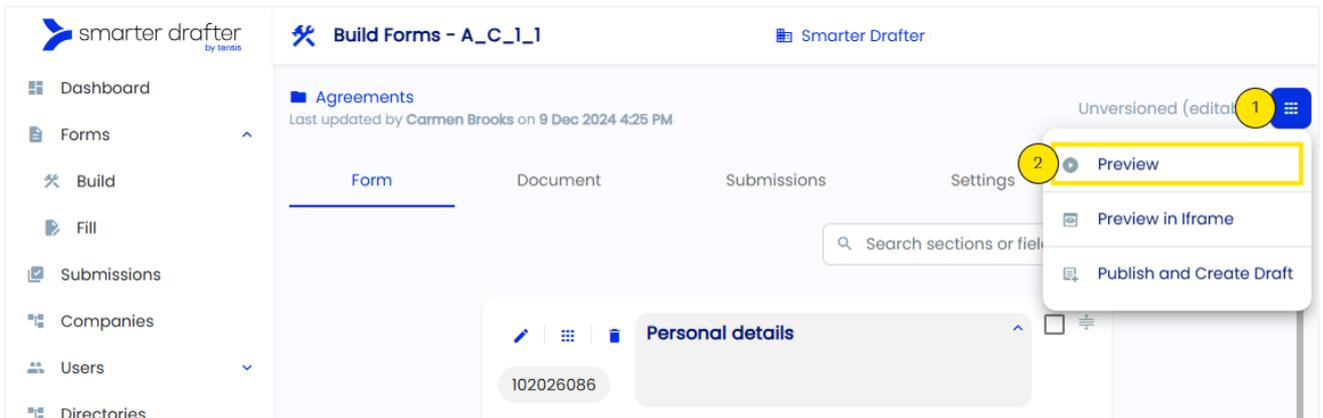


4. Test the Form

In this process, the preview feature will be used to test the form and create a finished document.

This can be done from the **Form Builder** screen.

1. Click the **waffle** button.
2. Click **Preview**.



There will be a pop up where you can choose who can see the submission. Make the required selection. Click **Start Form**.

Submission

Who can access this submission?

Myself only

Everyone

Specific users or groups

Start Form

A new browser tab opens with the form, ready to be filled in.

1. Enter test details into the form.
2. Click **Submit Form**.

Personal details

Please give us some details about yourself, and we will get in touch.

Name:

 Use Placeholder

Date of Birth:

Email:

 Use Placeholder

Phone:

 Use Placeholder

Submit Form

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- 1. Personal details

Name the submission. In this example, the name of the person in the form is used.

Submission Name

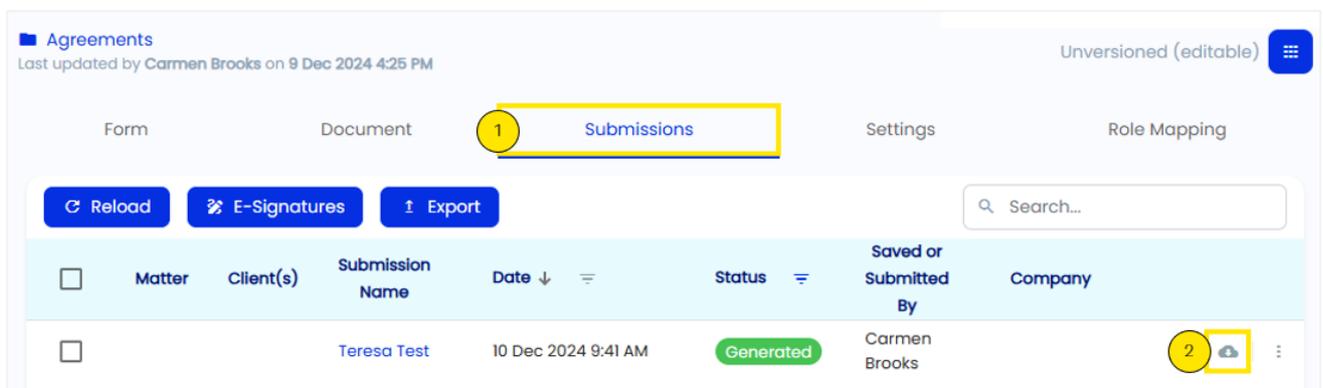
Submit Form

4.1 Produce a Document

It's now possible to produce a finished document for this submission.

Go back to the first browser tab, where the Form Builder is open.

1. Click the **Submissions** tab. The submission that was just run is in the list, with the name of the person on the submission.
2. Click the **cloud icon** on the right-hand side of the submission. This will launch the download of a completed document (in this example, it's for Teresa Test).



Agreements
Last updated by Carmen Brooks on 9 Dec 2024 4:25 PM

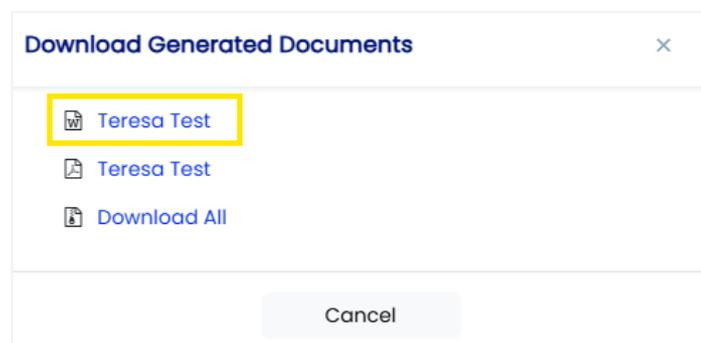
Unversioned (editable)

Form Document **Submissions** Settings Role Mapping

Reload E-Signatures Export Search...

<input type="checkbox"/>	Matter	Client(s)	Submission Name	Date ↓	Status	Saved or Submitted By	Company
<input type="checkbox"/>			Teresa Test	10 Dec 2024 9:41 AM	Generated	Carmen Brooks	

There are options to download a Word document or a PDF. In this example, a Word Document will be downloaded.



Download Generated Documents

Teresa Test

Teresa Test

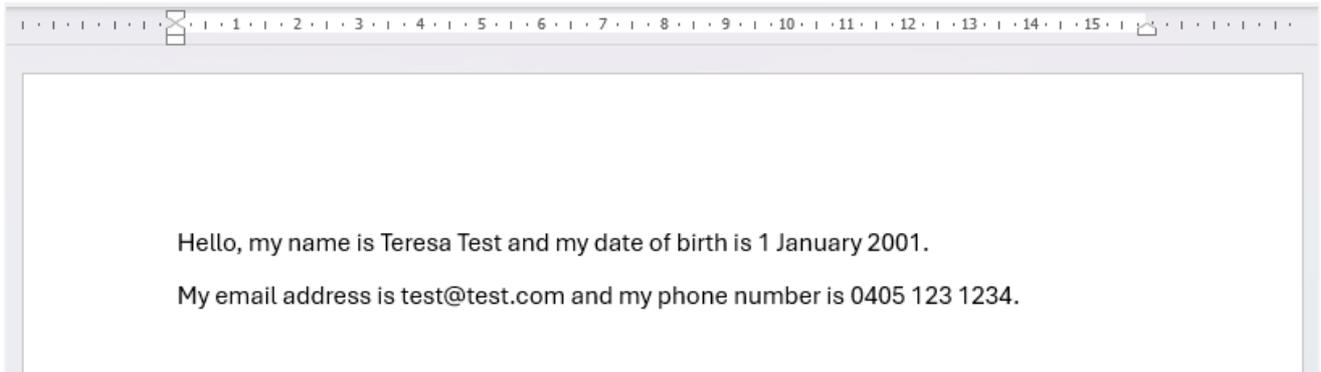
Download All

Cancel

4.2 Check the Document

Open the downloaded document.

The Teresa Test example was produced perfectly. Here is the output:



4.3 Making Modifications to the Template

If there are problems with the document that you would like to correct, reopen the template document, (created on page one and two) in MS Word and make modifications.

To replace the template, follow the file upload process in the Microsoft Word Smarter Drafter Add-In. A radio button will appear beside the original file in a pop up. Select the **radio button**, and click **Replace**.

