



# Field Types

## Help Guide

















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# 1. Fields: A Quick Reference Guide

<p> <b>Text</b></p>	<p> <b>Text Area</b></p>	<p> <b>Rich Text</b></p>
<p>Short text answer</p>	<p>Long text answer Filler can apply formatting</p>	<p>Note to filler No interaction by filler</p>
<p> <b>Radio</b></p>	<p> <b>Checkbox</b></p>	<p> <b>Select</b></p>
<p>Single select list Best for short list / short labels</p>	<p>Multi select list</p>	<p>Single select drop-down list Best for long lists / long labels</p>
<p> <b>Email</b></p>	<p> <b>Name</b></p>	<p> <b>Phone</b></p>
<p>Email address Checks for correct email config</p>	<p>Person's name Allows components to be separated</p>	<p>Phone / fax numbers Limits characters used</p>
<p> <b>Number</b></p>	<p> <b>Date/Time</b></p>	<p> <b>Address</b></p>
<p>Numerals Apply decimal spacing, format, prefixes and rounding Set conversions</p>	<p>Date and/or time Set format Apply limitations</p>	<p>Street and postal addresses Connected to Google Maps for lookup and validity check Allows components to be separated</p>
<p> <b>ID Number</b></p>	<p> <b>File Upload</b></p>	<p> <b>Matter</b></p>
<p>Company numbers Connected to ASIC for validity check</p>	<p>Image or file upload Upload image into body of doc OR separate file to generate with doc</p>	<p>Matter reference Matter ID selected during docgen</p>
<p> <b>Currency</b></p>		
<p>Select currency type Apply decimal places, format and prefixes</p>		

## 2. Things to Consider

### 2.1 Consider the Order of the Fields

It is recommended that you group fields together in a way that logically guides the filler through the form. Sections should be used to separate fields into their relevant group, EG party details, then property details, then transaction details etc. The sections should be presented in the order in which they appear in the document and/or in a practical order that would be easily followed by the filler.

If one field needs to reference another field, the referenced/source field must appear in the form first. The reason for this is, when the filler is completing the questionnaire and reaches this field, it won't produce the right result if the referenced field is below and the filler hasn't answered it yet.

### 2.2 Consider the Type of Field Used

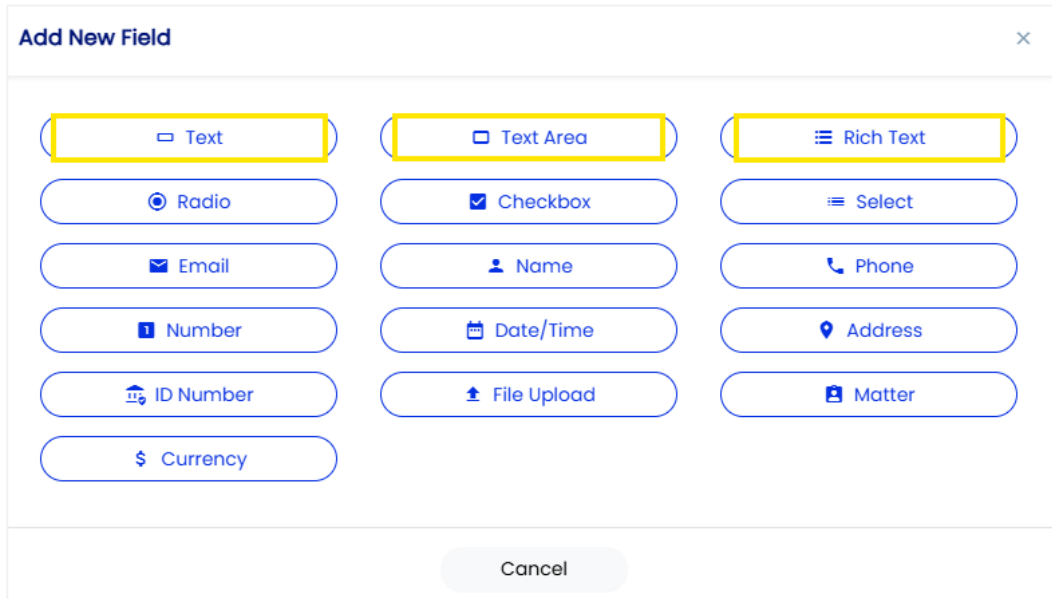
There are several field types and each has a specific purpose with unique features. Choosing the most suitable field type will assist in controlling the type of response the filler can provide and reduce errors in the response entered.

### 2.3 Consider the Settings Applied

Each field type has settings that are relevant to that particular type of field. Applying the appropriate settings will assist in controlling the type of response the filler can provide, set limitations and apply the format required, reducing errors in the response entered and designing the structure of the field when it's inserted in the Word template.

### 3. Add Text to Forms

Text fields may enable the form filler to type free text into a form, or they may enable a message to be embedded in a form for a form filler to read. The three different types of text fields will be explored here: **text**, **text area**, **rich text**.

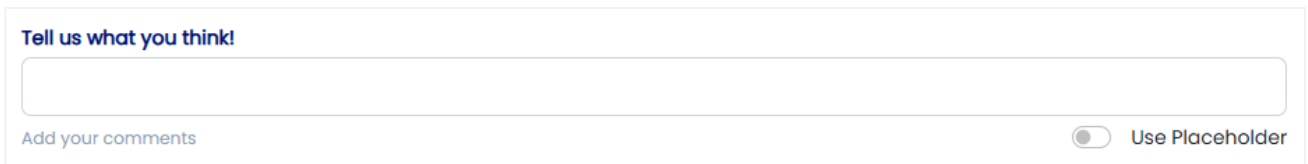


#### 3.1 Text Field

Displays a single-line field for text entry.

- Used where the answer is expected to be brief.
- Filler can enter unlimited characters, but only one line of text will be visible.

In a finished form, a text field looks like this:

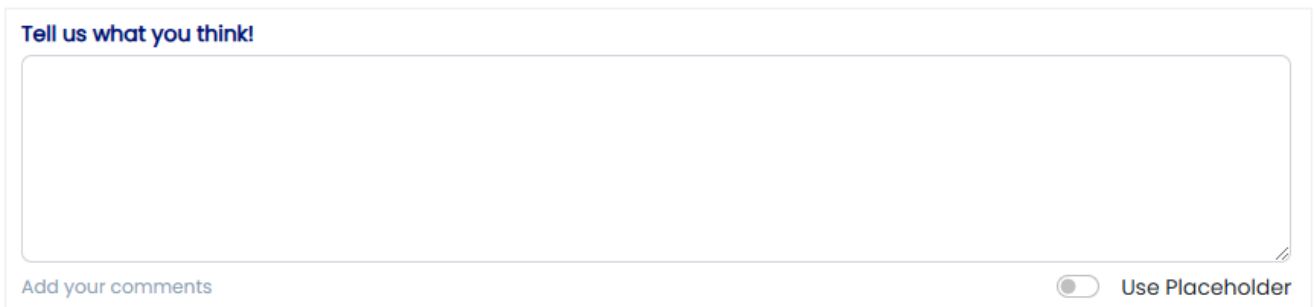


## 3.2 Text Area

Displays a multi-line field for text entry.

- Used where the answer is expected to be lengthy.
- Filler can enter unlimited characters and field can expand to reveal full text.
- Option to enable rich text and allow filler to apply formatting within the field.

In a finished form, a text area looks like this:



**Tell us what you think!**

Add your comments

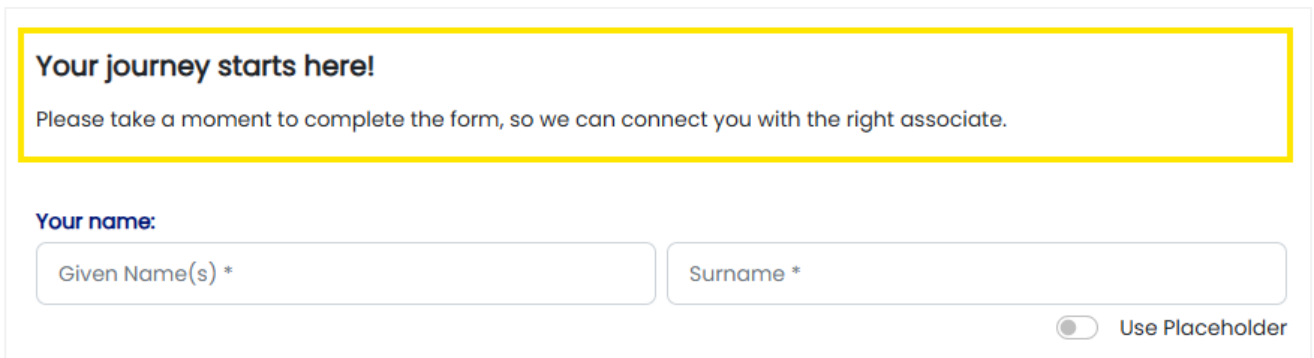
Use Placeholder

## 3.3 Rich Text

Build a note to the filler within the form.

- Ability to format text, insert links and images.
- View only, no input required by filler.

In a finished form, rich text looks like this:



**Your journey starts here!**

Please take a moment to complete the form, so we can connect you with the right associate.

**Your name:**

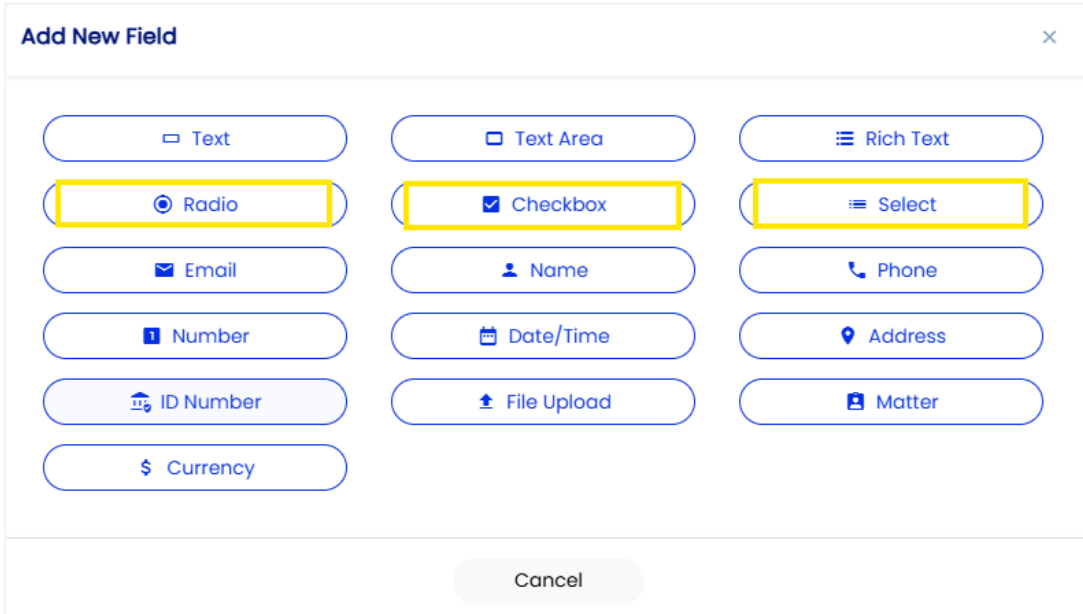
Given Name(s) \*      Surname \*

Use Placeholder

## 4. Add Multiple Choice Options to Forms

When designing a form, there will be situations where a form filler is required to make a selection from multiple options. Options sets are used to seamlessly offer multiple options.

There are several types of options sets available: radio buttons, checkboxes and selection lists.



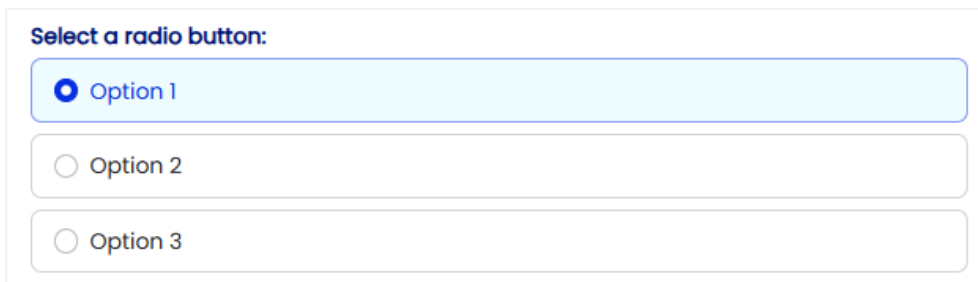
The screenshot shows a dialog box titled "Add New Field" with a close button (X) in the top right corner. It contains a grid of 18 field type buttons arranged in three columns and six rows. The buttons are: Text, Text Area, Rich Text, Radio, Checkbox, Select, Email, Name, Phone, Number, Date/Time, Address, ID Number, File Upload, Matter, and Currency. The "Radio", "Checkbox", and "Select" buttons are highlighted with yellow rectangular boxes. A "Cancel" button is located at the bottom center of the dialog.

### 4.1 Radio Buttons

Single-select list of options.

- Used for a short list of options and options with short labels.
- Logic can be applied to control if/when an option appears.

A radio button list looks like this in the form:



The screenshot shows a form titled "Select a radio button:". It contains three radio button options stacked vertically. The first option, "Option 1", is selected, indicated by a blue dot inside the radio button. The second option, "Option 2", and the third option, "Option 3", are unselected, indicated by empty radio buttons.

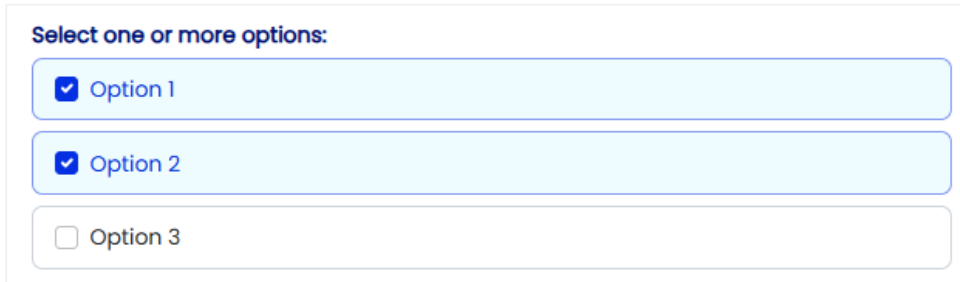


## 4.2 Checkboxes

Multi-select list of options.

- Used when multiple options can be selected.
- Logic can be applied to control if/when an option appears.

Checkboxes look like this in a finished form:



**Select one or more options:**

Option 1

Option 2

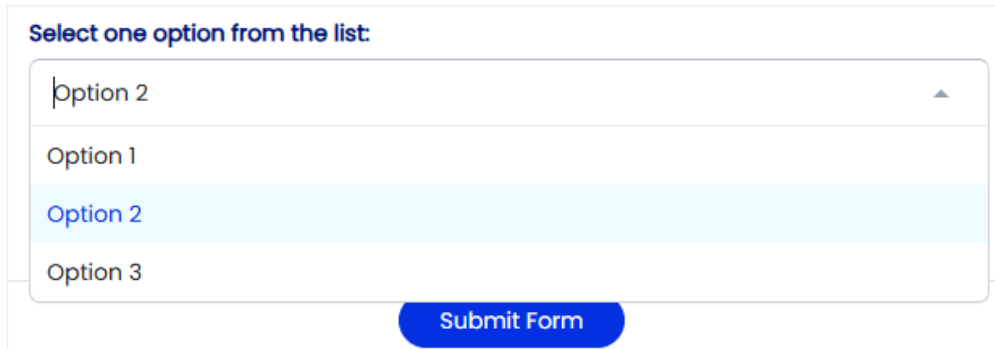
Option 3

## 4.3 Select

Single-select list of options.

- Used for a long list of options and options with long labels.
- Logic can be applied to control if/when an option appears.

Selection lists appear as follows:



**Select one option from the list:**

Option 2

Option 1

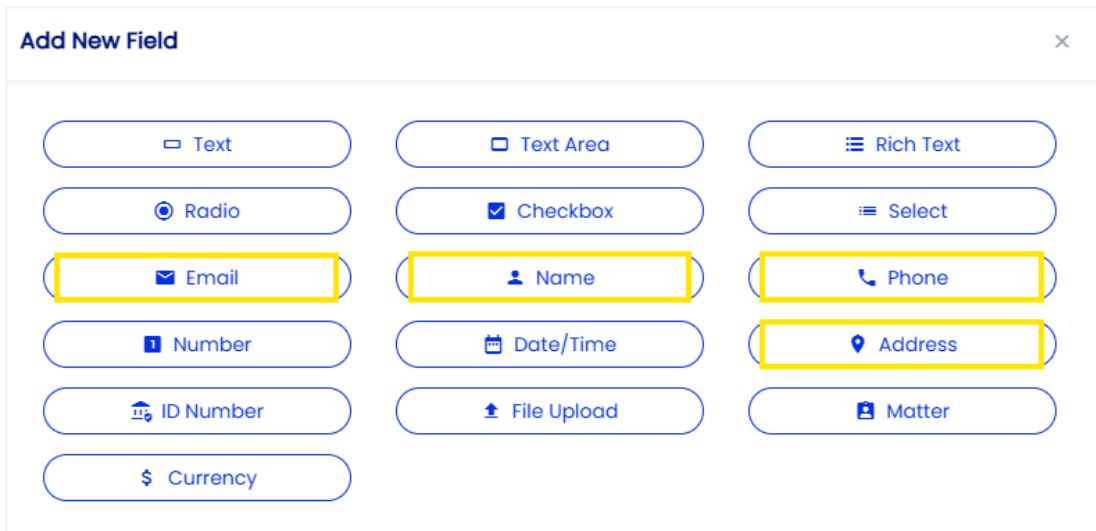
Option 2

Option 3

**Submit Form**

## 5. Personal Details Fields

Fields to add personal details including **Email**, **Name**, **Phone** number and **Address** can be added to a form. By using the specific field type for its purpose, contact mapping can be applied to enable autofill in the finished form (refer to the module on [contact mapping](#)).



### 5.1 Email

- Email address.
- Checks config of input is correct.

### 5.2 Name

- Person's name.
- Separates answer into components for first, middle, given and last names.

### 5.3 Phone

- Phone / Fax numbers.
- Limits type of characters used.

### 5.4 Address

- Street or postal address.
- Connects to Google Maps for look-up and validity check.

In a finished form, the personal details fields described above look like this:

**Enter your name:**

Use Placeholder

**Enter your email:**

Use Placeholder

**Enter your phone number:**

Use Placeholder

**Enter your address:**

Australia ▼

Use Placeholder

## 6. Numbers and Figures Fields

There are several fields which can be used to add a number or figure – each one has a specific use.

**Add New Field** ✕

☐ Text	☐ Text Area	☰ Rich Text
⦿ Radio	☑ Checkbox	☰ Select
✉ Email	👤 Name	☎ Phone
1 Number	📅 Date/Time	📍 Address
🆔 ID Number	📎 File Upload	📁 Matter
\$ Currency		

Cancel

## 6.1 Number

- Numeric answer.
- Limits type of characters used.
- Apply settings for prefix, decimal places, format, rounding and convert to words.

## 6.2 Date/Time

- Date or Time or Both.
- Apply format, set limitations.
- Separates answer into components for line 1, line 2, suburb, state, postcode and country.

## 6.3 Currency

- Currency options.
- Used when multiple currencies are available and allows the filler to select the required currency.
- Apply decimal places, format and prefixes.
- Note: A number field would be used where a single set currency applies).

In a finished form, these fields look like this example:

**How long have you lived at your current address:**

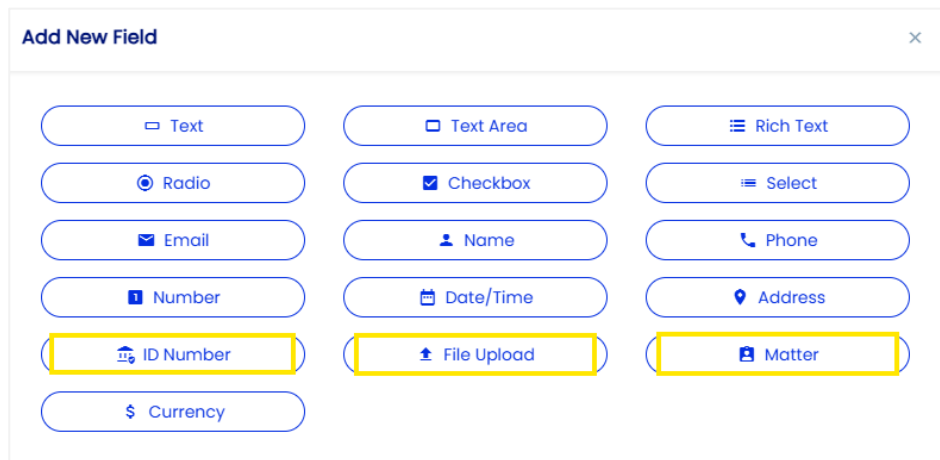
Enter the number of years you've lived at your current address. Do not include months.

**Enter your date of birth:**

**Enter your annual gross income:**

## 6.4 Identification and Documentation Fields



## 6.5 ID Number

- Company numbers.
- Connects to ASIC for validity check.

## 6.6 File Upload

- Image or file upload.
- Filler can select an image to upload into the body of the document or select a file/s to generate separately with the document.
- Apply limitations to file types and number of files permitted.

## 6.7 Matter


- Matter reference/number.
- Connects to the matter ID used when generating a document.

In a finished form, these fields look like this:

**Enter your Social Security Number:**

This data is private and confidential.  Use Placeholder

**Upload a copy of your government issued identification:**



Drag & drop your file here

OR

Upload

**What matter is this request related to?**

The matter number can be found on your invoice.  Use Placeholder

## 7. Field Properties

### 7.1 Question Type

There are four options applicable to a question type:

**Question Type**

Required

Optional

Read-Only

Hidden

A **required field** must be filled in in order for the form to be submitted.

- It is recommended to set fields to required to force the filler to provide an answer.
- The goal of the questionnaire is to gather as much information as possible so that the automation is successful and reduces the manual changes required post docgen.

- If the filler wants to move past a question without answering, they can opt to use a placeholder and that field will appear in the Word document in yellow highlight to remind the filler to manually complete the details later, though this isn't recommended. Placeholders aren't available on all field types and fillers will be forced to enter the required data, such as dates or selection questions.
- It's important to ensure that fields used in logic and calculations are set to mandatory so that the flow of the document is reliable.

An **optional field** can be left blank, and the form can be submitted.

- Only set a field to optional if you want to allow the user to ignore it – for example, not everyone has a fax number so this is a field commonly set to optional. If an optional field is blank, the filler will be alerted that some data will be left out of their document.
- Optional fields can be left empty so if the filler ignores it, nothing will appear in the document. Unlike a placeholder, if a filler leaves nothing, they will be alerted when the Word document is produced.

A **read-only field** can display data to the form filler, calculated from the content of other fields.

- Set a field to read only when you want the field to be visible but the filler won't be able to touch it. This is useful where you want to display the result of an important [calculation](#) so that the filler is confident the answer is correct.

A **hidden field** is not visible in the form when it is filled.

- Set a field to hidden when you don't want the field to be seen at all, EG a filler doesn't need to see the field for today's date or the result of a simple calculation, like an age field.
- It is often used to record [calculations](#) which are displayed in the [submission](#).

## 7.2 Case

Assign the default case for when the field is inserted into the Word template. If you need to switch the case, the Word add-in will allow you to override the default.

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**Note:** When creating name and address fields, ensure you set the case to 'none' so that you don't reformat names like McDonald or hyphenated names, such as Smith-Jones.

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## 7.3 Supporting text

To increase the filler's success in answering fields, you can add supporting text / tool tips to a field to help the filler determine the answer and/or provide some context around the question. The supporting text will be immediately visible to help guide the filler when they see the question.

## 7.4 Default values

Apply a default value where you want to guide the filler to the most likely answer, or the answer is set.

For **radio and select fields**, you can assign a choice either by applying the default in the field settings or selecting the preferred answer after you have saved the field.

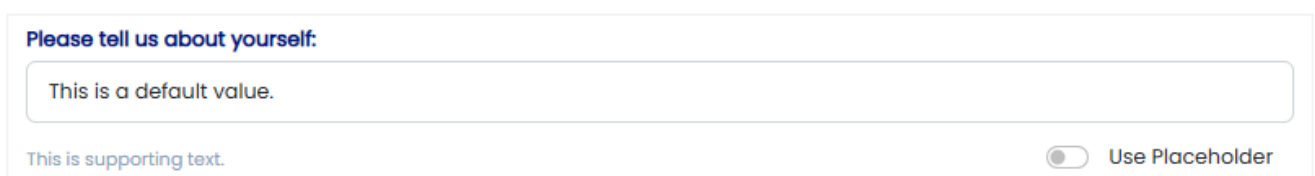
For **checkbox fields**, you need to save the field and then click the default choices in the field within the section.

For **address fields**, you need to save the field and then type the answer into the field components within the section. If you are creating an address field where the country may differ, you can just insert the country to assist the user with a more accurate Google Maps look-up.

For **currency fields**, you can assign a choice either by applying the default in the field settings or selecting the preferred answer after you have saved the field.

For all other field types, you can type the default answer in the field settings or enter it after you have saved the field.

Default values and supporting text appear like this:

A screenshot of a form field. At the top left, the text 'Please tell us about yourself:' is displayed in a bold, blue font. Below this is a rounded rectangular input field containing the text 'This is a default value.' in a light blue font. Below the input field, the text 'This is supporting text.' is displayed in a light blue font. To the right of this text is a toggle switch that is currently turned off, followed by the text 'Use Placeholder' in a bold, blue font.

## 7.5 Minimum / Maximum values

Set min/max values to limit the range a filler can enter. For a salary question, you may want to limit the minimum to say \$10,000 to insist on a five digit number and ensure they don't enter an unrealistic four digit number by accidentally leaving off a '0'. Alternatively, you may want to apply a maximum cap to prevent them entering an exorbitant amount.



## 7.6 Minimum / Maximum characters

For text responses, set min/max characters to limit the filler to a brief answer, or force them to provide a detailed response.

For phone numbers, set the minimum characters for the length of a phone number.

## 7.7 Date / Time limitations

**On or after:** Select another date field in your form to insist that the date the filler enters is 'on or after' the date entered in the previous field. Example: a date of separation must be after the date of marriage.

**On or before:** Select another date field in your form to insist that the date the filler enters is 'on or before' the date entered in the previous field. Example: a date of birth must be before today.

**Units:** This allows you to specify the unit (minutes/hours for time - days/months/years for dates) and measure (before/after) today, to insist that the date the filler enters meets the set criteria. Example: set a due date to a minimum of 14 days from today.

## 7.8 ID format

Specify the type of company number to determine the format of the response.

## 7.9 Use as – File upload

Specify the type of upload (image or attachment) required by the question.

For an attachment, select the type of file extensions permitted and the min/max number of files allowed to control what the filler will be able to upload.

# 8. Referencing fields

## 8.1 Field order

When creating a field, you can make reference to other fields as long as they're above your field in the form layout. You can include other fields in heading text, the body of fields and as options in a selection field.

Example: You may have asked a question to gather all of the children's names and then you need to ask 'Which child?'. You can have the names of the children automatically appear in a selection list for the filler to choose from.

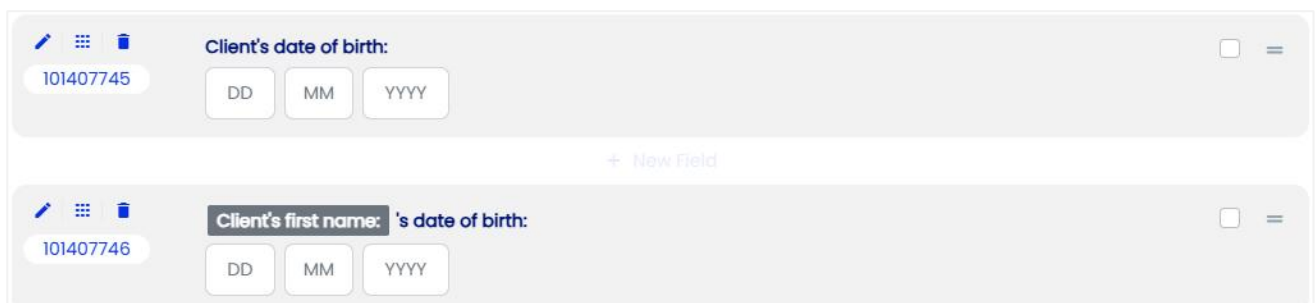
## 8.2 Field used in the labels of other fields

The label of a field can use the answer of another field, EG if the filler answers that the client's name is 'John', the client date of birth field can use the label of the client's name field so instead of reading 'Client's date of birth', it can display 'John's date of birth'.

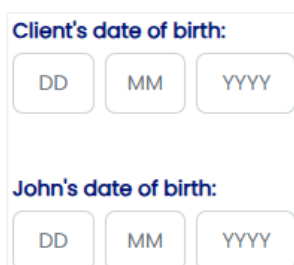
To do this, insert the field ID number of the client's name field in your label for the client date of birth field. The client date of birth field label will look something like this:

[@123456789]'s date of birth:

Here are the 2 ways the question could be asked:



Here is how each version would appear to the filler:



## 8.3 Fields used as list options

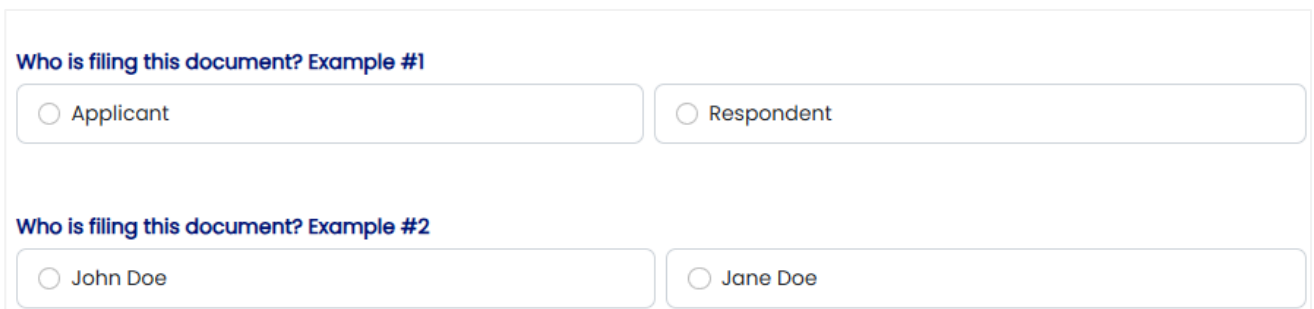
Field IDs can be used in the list options of radio/select/checkbox fields, EG:

1. There are questions asking 'who is the applicant' and 'who is the respondent' – then there's a subsequent question asking 'who is filing this document'.

Here are the 2 ways the filing question could be asked:



Here is how each version would appear to the filler:



To achieve this, use the field IDs in your option list rather than Applicant/Respondent text, for example:



## 8.4 Fields used within the content of other fields

Field IDs can be used within the content/default answer of other fields.

Example: You may have questions asking for the applicant/respondent names and property address, and then you may want to use those fields in the default answer of another question, EG detailing the transfer of the property from one party to the other:



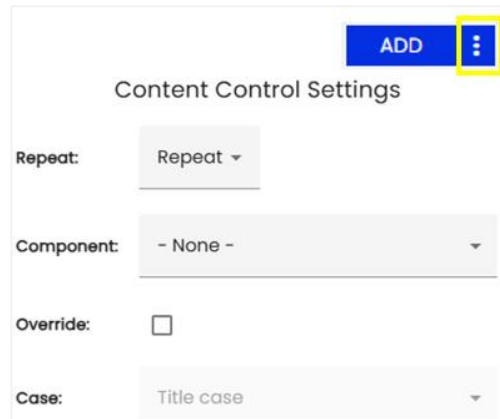
## 8.5 Working with fields in your template

Once a field has been inserted into your template, you can use additional features in the Word add-in to alter its behaviour. Place your cursor within the field and the Word add-in will check the type of field used and then reveal the available features, for example:

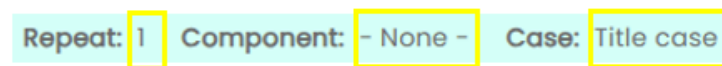
Name	Inserting a name field defaults to the full name and case you applied in the form – make adjustments by selecting the required component, EG first, middle etc, and use the override feature to adjust the case
Address	Inserting an address field defaults to the full address, case and format you applied in the form – make adjustments by selecting the required component, EG first line, suburb etc, and use the override feature to adjust the case and format
Date	Inserting a date field defaults to the case and format you applied in the form – make adjustments by selecting the required component, EG day, month etc, and use the override feature to adjust the case and format
Radio	Inserting a radio field defaults to the choice the user selects – use the override feature to adjust the case, and use a named range to convert to a checkbox
Checkbox	Inserting a checkbox field defaults to the choice the user selects – use the override feature to adjust the case, and use a named range to convert to a checkbox
Drop-down	Inserting a drop-down field defaults to the choice the user selects – use the override feature to adjust the case, and use a named range to convert to a checkbox

## 8.6 Altering fields in the template

When you click on the kebab next to the 'add' button, the available features and adjustment options will be displayed, example:



Alternatively, when you click on a field, the Word add-in will reveal the same details, for example:



Select specific  
repeat instance

Select  
component

Adjust case

The field list displays icons that provide details about the field structure, for example:



Calculation

Logic

Navigate to first  
instance of field

Navigate through  
each instance of field