smarter drafter PRO
by tensis

Parent / Child Forms

Help Guide

Table of Contents

1. Parent and Child Form Relationship

A **child form** is a type of smart online form based on another form, called the **parent form**. Child forms are used to create a copy of another form (their parent) with minor adjustments, such as hiding specific fields. Child forms automatically receive the updates that are made to their parent form. The main benefit of child forms is that you can create multiple very similar forms whilst only having to maintain one parent (both form and template). No new sections or fields can be added to a child form, nor can sections and fields in a child be ordered differently to the parent.
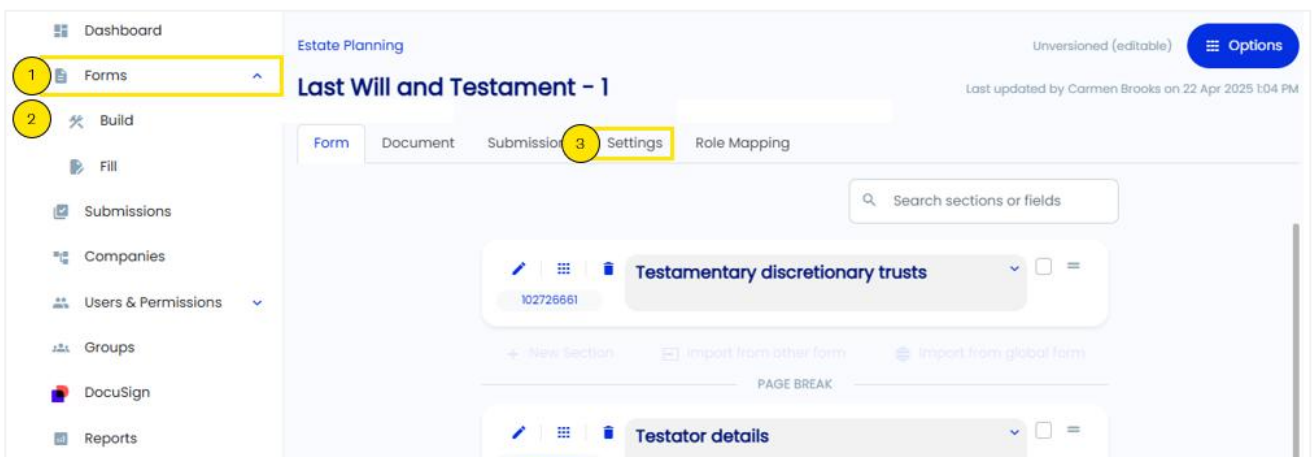
An example of a child form is one created for users in a particular jurisdiction such as a single state or country where there are broad similarities to other jurisdictions. To achieve this, you can create a single parent form that holds all the fields for all the jurisdictions and just make minor changes to each child to cater to the individual jurisdiction.

Any form can be used to create a child form. When a child form has been created, it has an ongoing relationship with the parent form – when the parent form is updated, the child form also takes on the changes. This guide will demonstrate how to create a child form and how the parent / child form relationship works.

1.1   Open the Parent Form

When you have identified a form that you would like to reuse as a child form, open the form in the form builder.
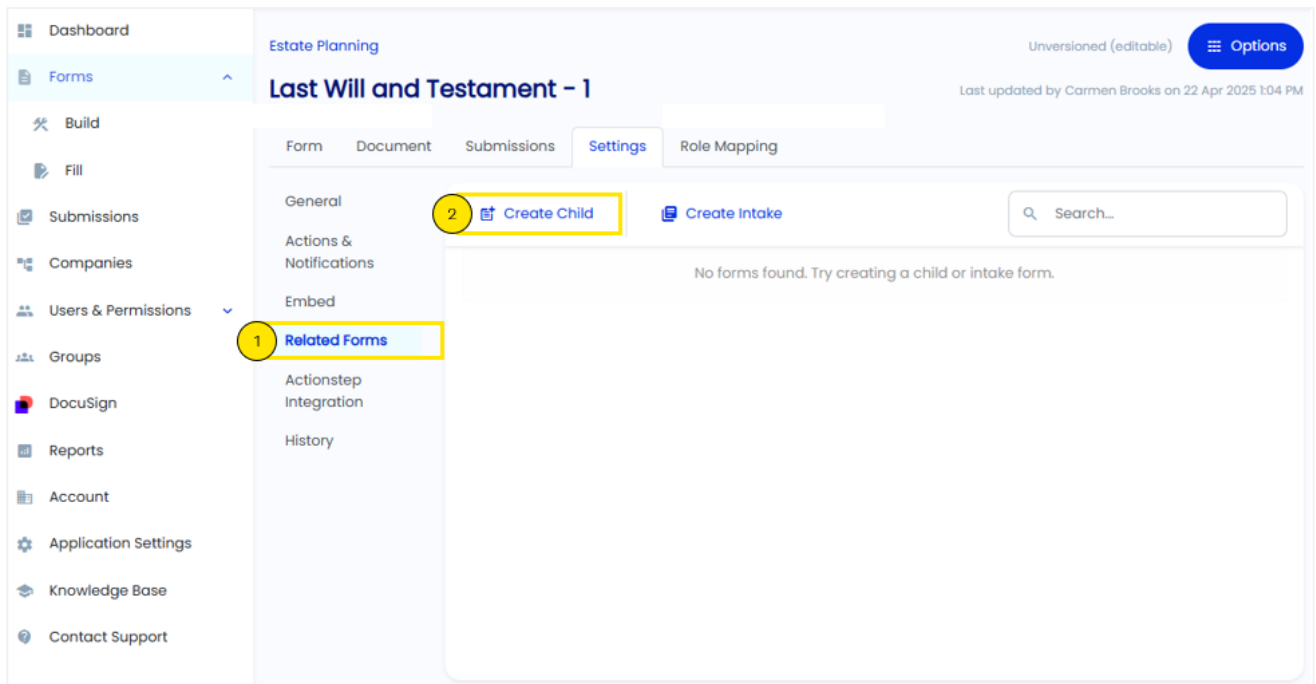
1. Click **Forms**.
2. Click **Build**. Open the form that is required.
3. Child forms are found under the settings tab. Click **Settings**.

1.2   Create the Child Form

In the settings tab, a new child form can be created.

1. Click **Related Forms.**
2. Click **Create Child.**

A pop up will open, where the **new child form** can be named, and a **folder** can be selected to save the child form. Click **Save.**
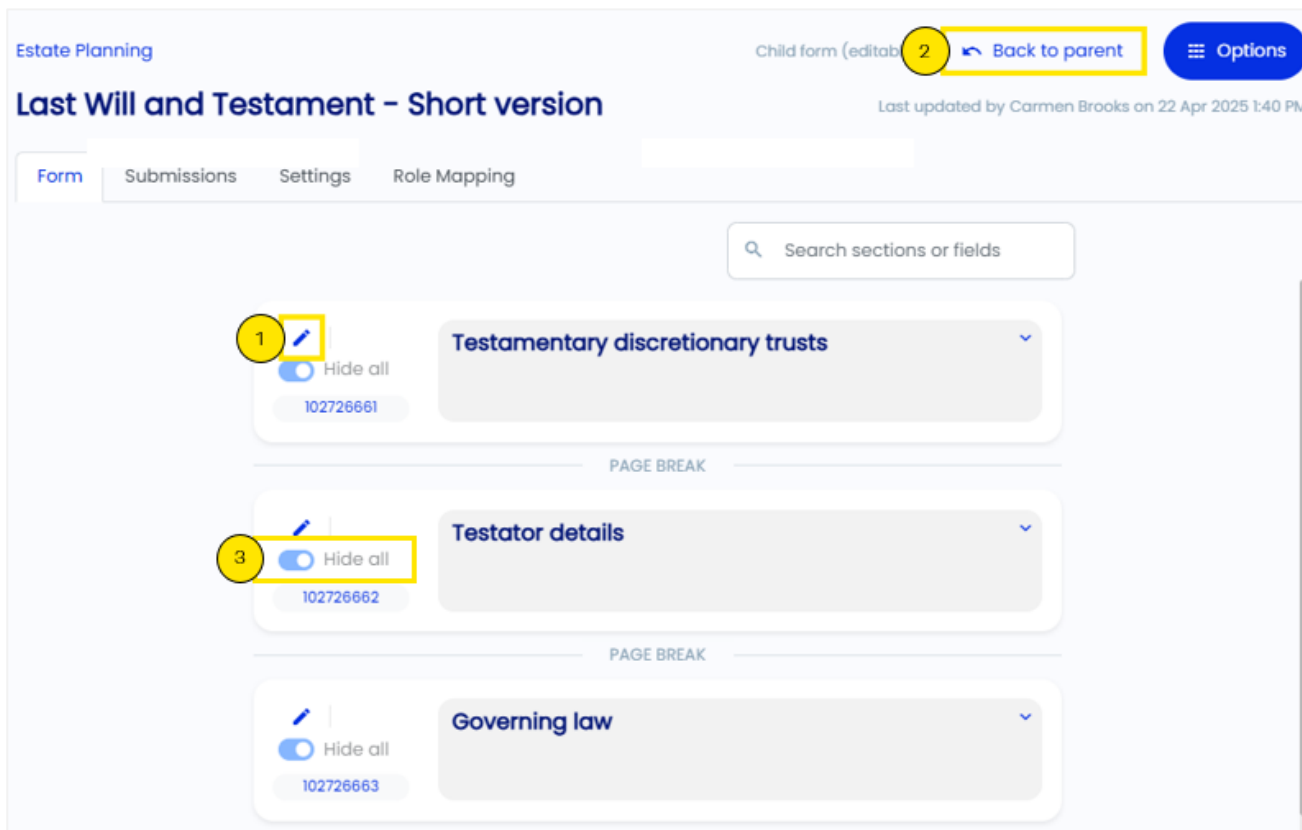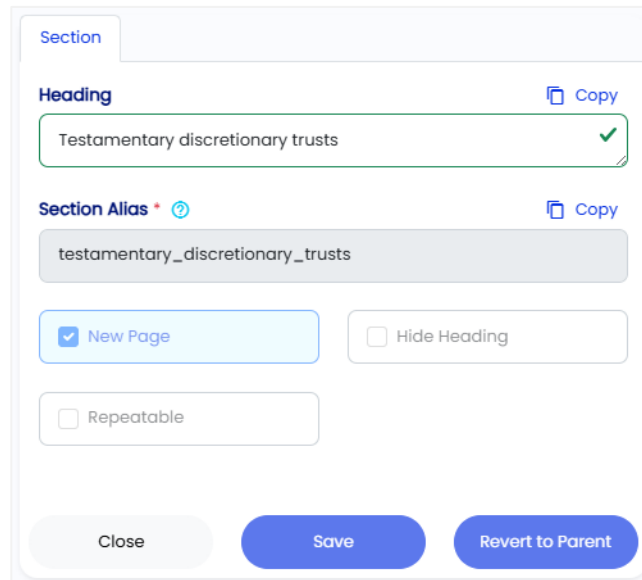
1.3   Edit the Child Form

The child form will open in the **form builder**.

1. Since this is a child form, editing within the child form is limited. Click the **edit button** to make changes to a section.
2. To return to the parent form from this screen, click **Back to parent**.
3. One of the biggest advantages to child forms is the **Hide all** toggle on each of the sections, which enables the section to be hidden or shown.
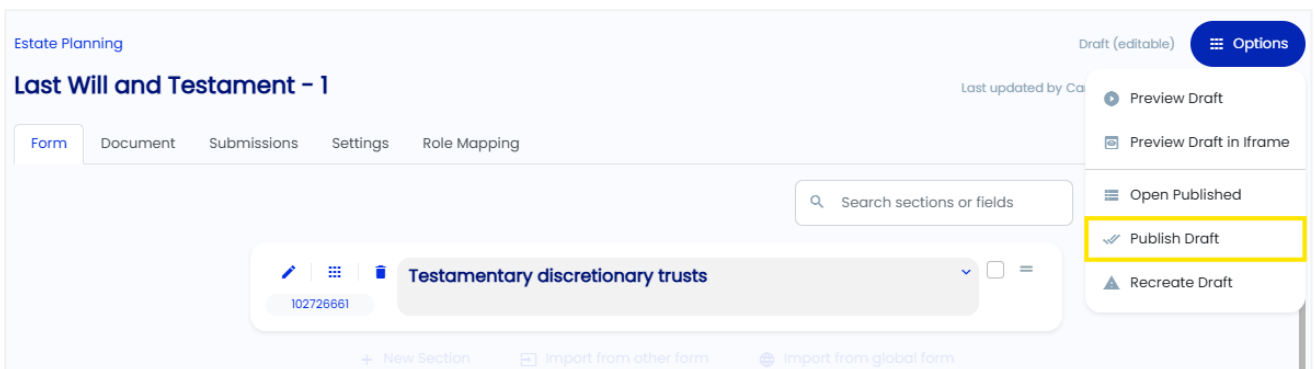

Note: Changing the label of a child form will not impact the logic of the form nor the merge fields in the template. The changes will be reflected when the form is previewed or embedded but have no further consequences. This can be useful for creating forms that have the same aim and mechanics, but different language for different target audiences.

When editing a child form, the **headings** can be changed. If changes have been made, click **Save** to make the changes permanent in the child form. Click **Revert to Parent** to remove any changes that have been made directly to the child form and restore the headings in the parent form.

2.   Parent / Child Form Interaction

To update a child form, the parent form must be updated – the changes made in the parent form will carry across to the child form. Changes made to a parent form will carry across when the new draft is published by clicking the **waffle button** and clicking **Publish Draft**.
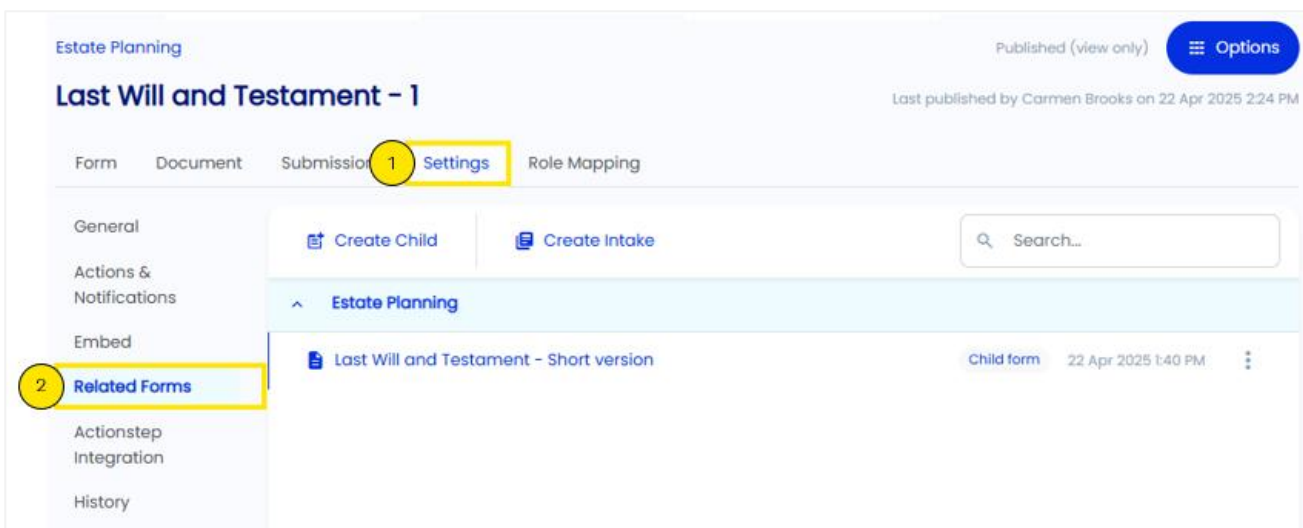

Note: Editing capability to a child form is limited, as the content of the parent form is the source. If any part of a question has been changed in the child form, that question disconnects from future changes made in the parent form. This relates to every type of change. When changes are published in the parent form, a builder should check those changes in the child form as they may not have transferred. That may be the required outcome, but it's important to check where it's a change that is required in the child form.

Note: When changes are made in a child form, impact on logic and named ranges should be carefully considered and checked.
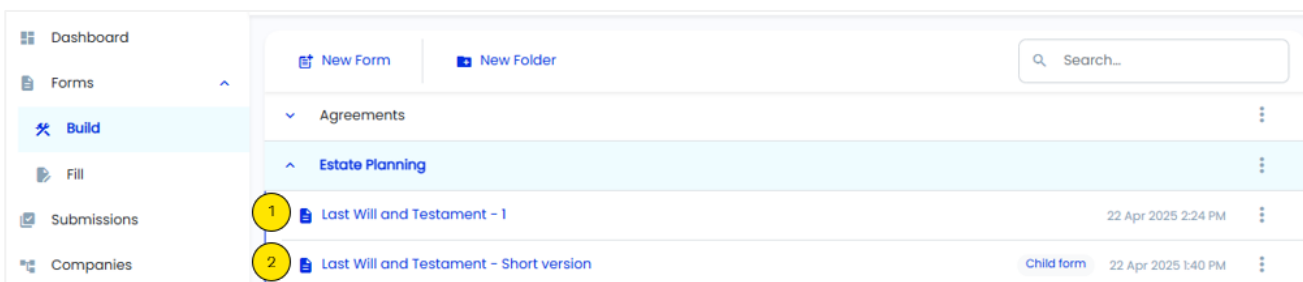
2.1   Opening a Child Form

Child forms can be found in the **related forms** section under the **Settings** tab of the parent form.

The child form can also be found in the forms list, in the location it was saved. In this example, both parent and child forms are saved in the **Estate Planning** folder. The child form is identified by a label.