



Parent / Child Forms

Help Guide

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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.

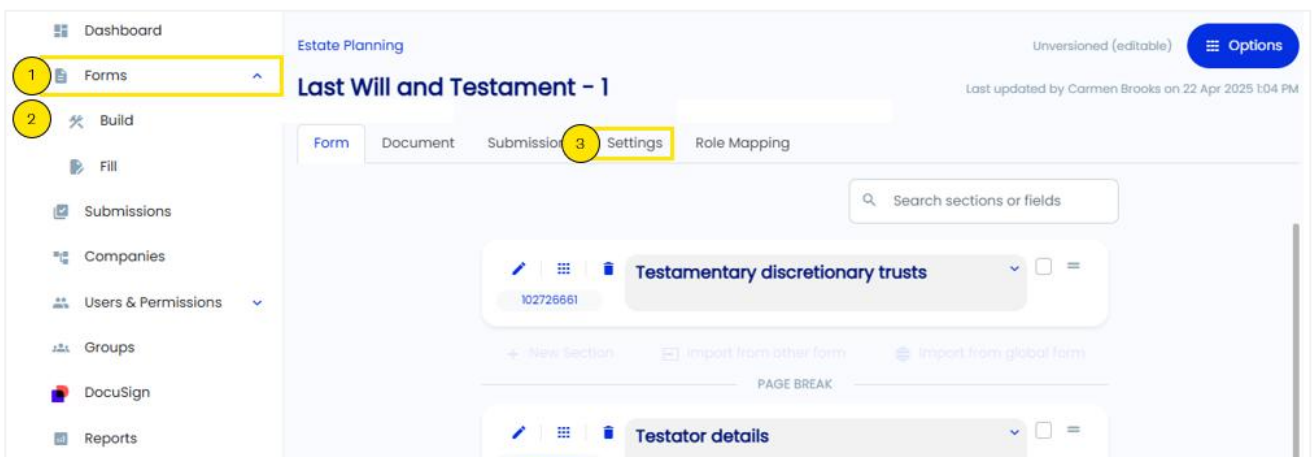
An example of a child form is one created for users in a particular jurisdiction such as a single state or country where there are broad similarities to other jurisdictions. To achieve this, you can create a single parent form that holds all the fields for all the jurisdictions and just make minor changes 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.

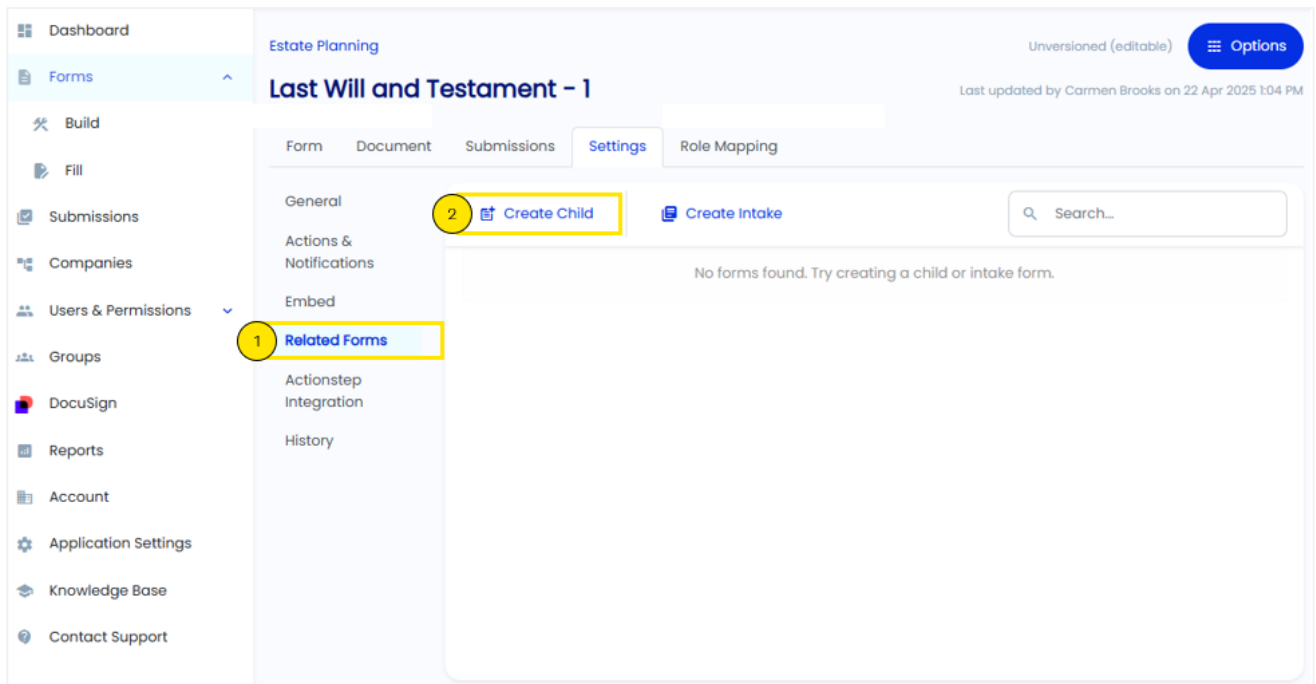
1. Click **Forms**.
2. Click **Build**. Open the form that is required.
3. Child forms are found under the settings tab. Click **Settings**.

The screenshot shows the Smarter Drafter web application interface. On the left is a sidebar menu with items: Dashboard, Forms (1), Build (2), Fill, Submissions, Companies, Users & Permissions, Groups, DocuSign, and Reports. The 'Forms' item is highlighted with a yellow box and a yellow circle containing the number 1. The 'Build' item is also highlighted with a yellow box and a yellow circle containing the number 2. The main content area is titled 'Estate Planning' and 'Last Will and Testament - 1'. It has a top right corner with 'Unversioned (editable)' and an 'Options' button (3). Below the title is a tabbed interface with 'Form', 'Document', 'Submission', 'Settings' (3), and 'Role Mapping'. The 'Settings' tab is active and highlighted with a yellow box and a yellow circle containing the number 3. The main area displays a form structure with sections like 'Testamentary discretionary trusts' and 'Testator details'. A search bar 'Search sections or fields' is visible. At the bottom, there are buttons for 'New Section', 'Import from other form', and 'Import from global form', along with a 'PAGE BREAK' indicator.

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.

Add New Child Form

Form name *

Last Will and Testament - Short version

Form Alias * ⓘ

last_will_and_testament_short_version

Copy

Folder *

Estate Planning

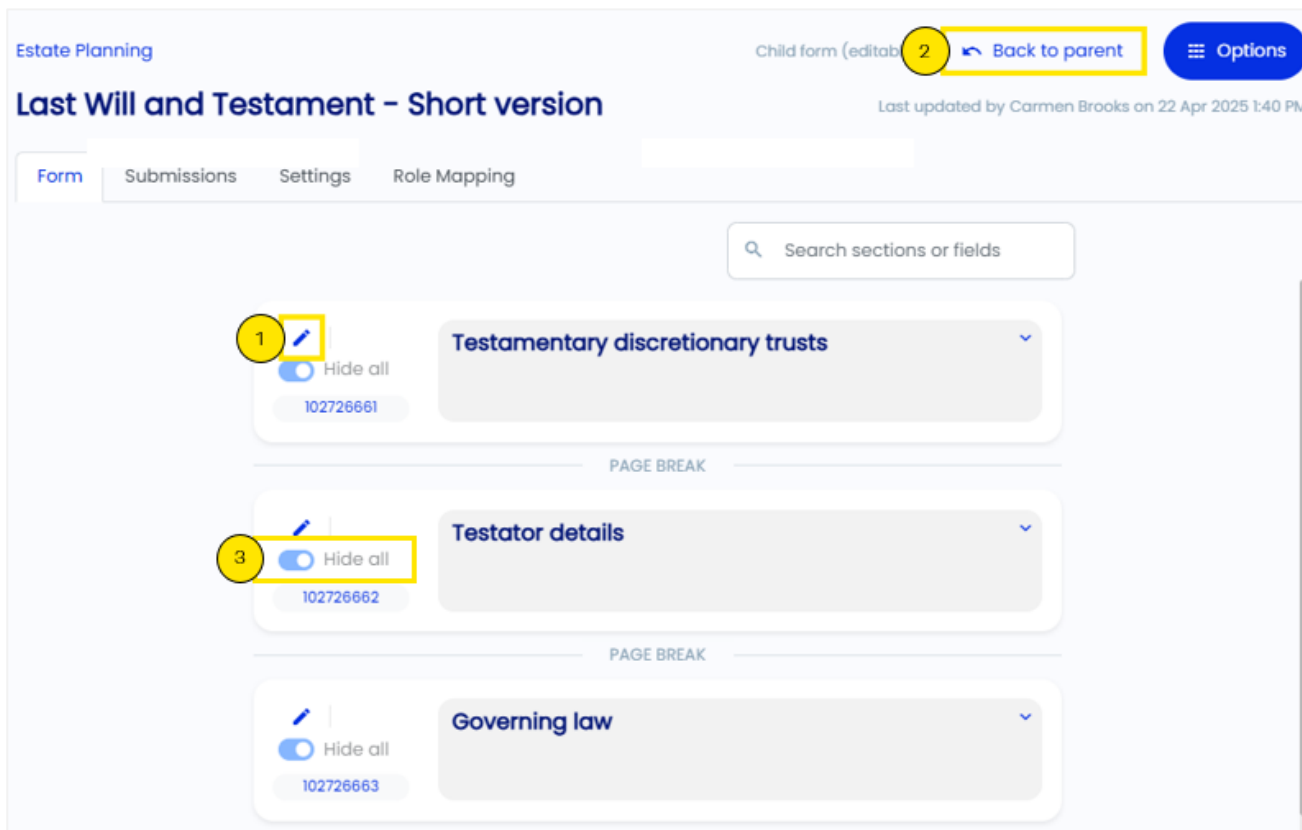
Cancel

Save

1.3 Edit the Child Form

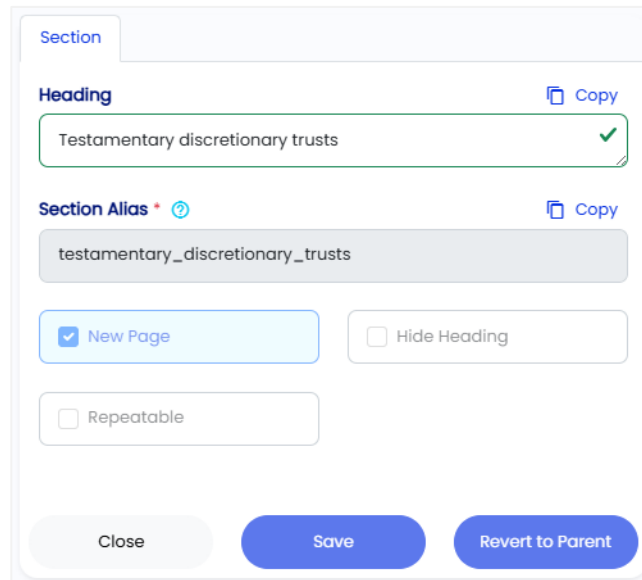
The child form will open in the **form builder**.

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.



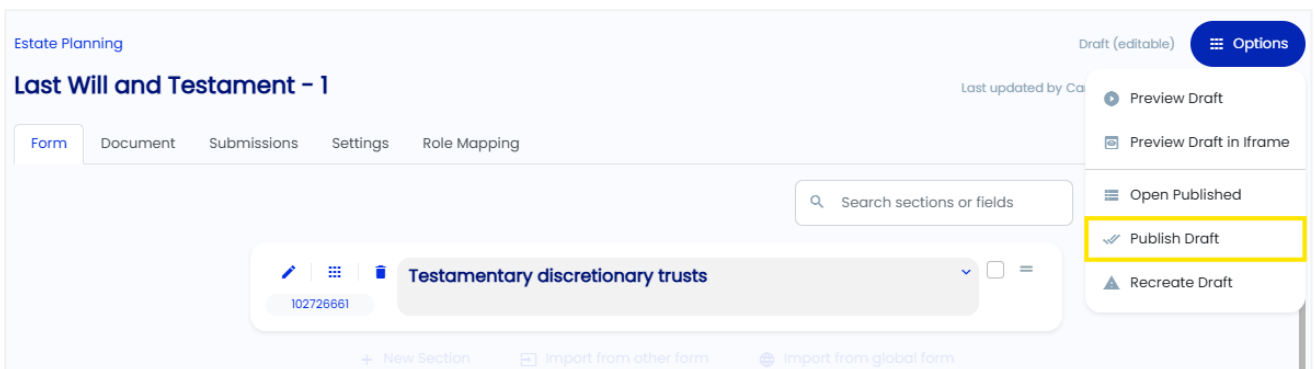
Note: Changing the label of a child form will not impact the logic of the form nor the merge fields in the template. The changes will be reflected when the form is previewed or embedded but have no further consequences. This can be useful for creating forms that have the same aim and mechanics, but different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

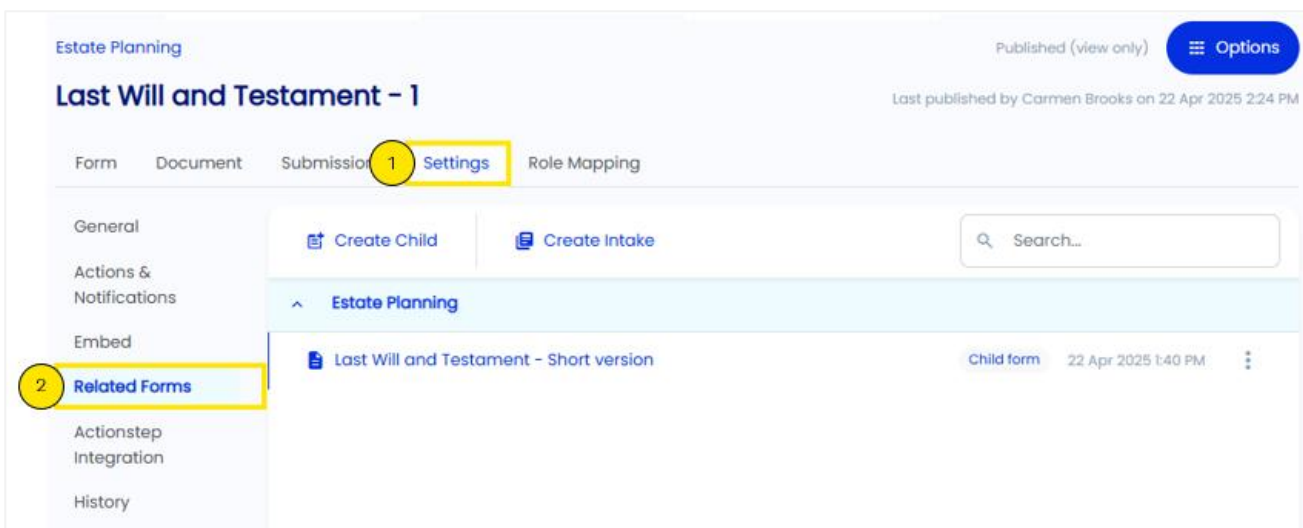


Note: Editing capability to a child form is limited, as the content of the parent form is the source. If any part of a question has been changed in the child form, that question disconnects from future changes made in the parent form. This relates to every type of change. When changes are published in 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.

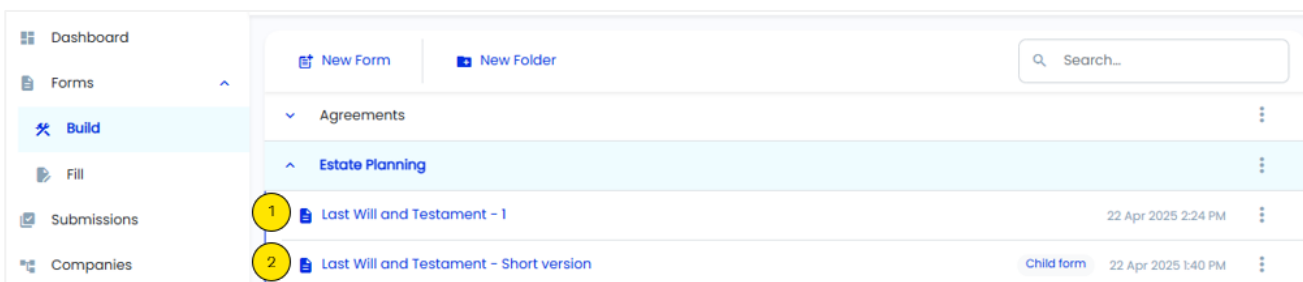
2.1 Opening a Child Form

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



The screenshot displays the 'Last Will and Testament - 1' form settings page. The 'Settings' tab is active, and the 'Related Forms' section in the left sidebar is highlighted. The main content area shows a list of related forms under the 'Estate Planning' folder, including 'Last Will and Testament - Short version' which is identified as a 'Child 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.



The screenshot displays the 'Forms' list in the Smarter Drafter interface. The 'Build' section is selected in the left sidebar. The main content area shows a list of forms under the 'Estate Planning' folder. The parent form 'Last Will and Testament - 1' is marked with a yellow circle 1, and the child form 'Last Will and Testament - Short version' is marked with a yellow circle 2 and labeled as a 'Child form'.