

Replacement Rules

Help Guide

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1. Global Replacement Rules

A replacement rule gives you the power to correct data before it is entered into document. For example, a replacement rule can be used to ensure that extra spaces are removed from form entries, to generate a grammatically correct document.

You can add universal replacement rules to all of your documents, or document replacement rules that apply to one document.

1.1 Create a Universal Replacement Rule

To create replacement rules:

- 1. Click Application Settings in the navigation menu.
- 2. Click Replacement Rules.
- 3. Click New Replacement Rule.

	Dashboard	< 0	option Sets	2 Replacement Rules	Template Styles	Snippets	Global Forms	Form Settings	Fie	ld Alia	ises	>
6	Forms							0				
۵	Submissions	3) + N	lew Replac	cement Rule				Q Search				
75	Companies			Name	Search	Replacement	Match	Match Whole				
**	Users				Text	Text	Cuse	words				
•t <u>e</u>	Directories		=	Replace '. ; and' with '; and'	.; and	; and	No	No	1	Ð	Î	
121	Groups		=	Replace ' ; and' with '; and'	; and	; and	No	No	1	Ð	Î	
۵	Payments		=	Replace '; and' with '; and'	.; and	; and	No	No	1	Ø	Î	
8	E-Signatures	_								_		
a	Reports		=	Replace ; with ;	.;	;	No	NO				
	Account		=	Replace ';' with ';'	;	;	No	No	1	œ	Î	
1 🗢	Application Settings		=	Replace ';' with ';'	.;	;	No	No	1	٥	Î	

When writing a replacement rule, consider the following:

- 1. The name. It helps to make the name recognisable and descriptive of what the replacement rule does.
- 2. The **Search Text** and **Replacement Text**. The replacement rule works like "find and replace" in Word. The sequence in the **Search Text** field will be replaced by the **Replacement Text**.
- 3. There is an option to **Match Case**. If you select "No", the case of letters will be ignored and the replacement will occur regardless of case.
- 4. Whole Words Only is generally set to "Yes".



- 5. The **Unconditional** setting means the replacement will occur every time. By setting this to conditional, it allows you to apply the replacement rule only in certain circumstances. For example, one client may require documents to be produced in a unique way, but eight other clients require them in a uniform way. You can create a replacement rule for the one client with unique needs.
- 6. When all fields are complete, click **Save**.

	Replacement Rule Properties		×
	Name *		
1	Replace '. ; and' with '; and'		
	Search Text *	Replacement Text	
2	.; and	; and	
	Match Case		
3	O Yes	• No	
	Whole Words Only		
4	• Yes	O No	
Б	Unconditional		
	Cance	el 6 Save	

In the example above, a replacement rule has been created to correct a common punctuation error – an unnecessary full stop has been removed. The full sequence of ". ; and" will be found and replaced with "; and".

1.2 Automatic Corrections

Replacement Rules can be an extremely powerful tool for performing automatic error correction, especially to correct errors that may arise from free-text user inputs.

For example, it's common for users to add an extra space at the end of a sentence that they don't intend to include in the document. Similarly, a user may add a full stop at the end of a sentence when the template already has a full stop added after the <u>merge field</u> in the document, in which case you don't want both full stops to be included in the final document.



1.3 Edit, Clone or Delete Replacement Rules

A replacement rule can be edited, cloned or deleted from the replacement rules list.

- 1. The pencil shaped **Edit button** will reopen the **Properties** window to enable editing of the replacement rule.
- 2. The **Clone button** will create a copy of the replacement rule and open the **Properties** window of the clone, to enable editing.
- 3. The **Delete button** is shaped like a trash can.

+ Ne	ew Replo	acement Rule				Q Search	
		Name	Search Text	Replacement Text	Match Case	Match Whole Words	(1)(2)(3)
	=	Replace '. ; and' with '; and'	.; and	; and	No	No	/ 0 1
	=	Replace'; and' with '; and'	; and	; and	No	No	× 101 m
	=	Replace '; and' with '; and'	.; and	; and	No	No	× @ *
	=	Replace '.;' with ';'	.;	;	No	No	∕ @ ≆
	=	Replace';' with ';'	;	;	No	No	/ 0 1
	=	Replace ';' with ';'	.;	;	No	No	/ 0 1



2. Document Specific Replacement Rules

2.1 Create a Document Specific Replacement Rule

A replacement rule can be applied at the document level, to affect only the document to which it is applied. A replacement rule applied this way will affect only the document it's applied to. Open the form in the form builder to apply a document replacement rule.

- 4. Click Forms.
- 5. Click Build.
- 6. Click the **Document tab**.
- 7. Click Replacement Rules.
- 8. Click New Replacement Rules.

The replacement rule pop up will open. The process to set up and manage a document replacement rule is similar to a universal replacement rule (see topic 1.1).

1		Dashboard Forms	^	HR forms > Employee agree Last updated by Carmen Brooks on	Unversioned (editable)						
2	死 Build			Form	3	Document		Submissions		Settings	Role Mapping
		 Fill Submissions Companies 		Named Ranges		5 + New Replacer	nent Rule				Q Search
-				4 Replacement Rules			Name	Search Text	Replacement Text	Match Case	Match Whole Words
-		Users	~	Templates				No	rules found. Try adding	g a new Rule.	