smarter drafter PRO
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Replacement Rules

Help Guide

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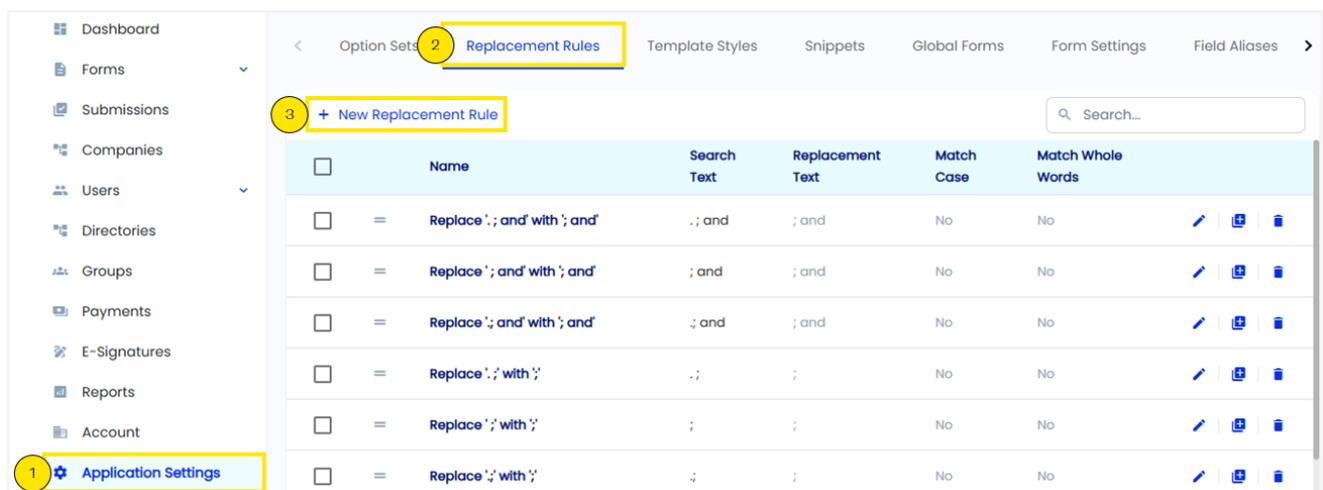# 1.   Global Replacement Rules

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

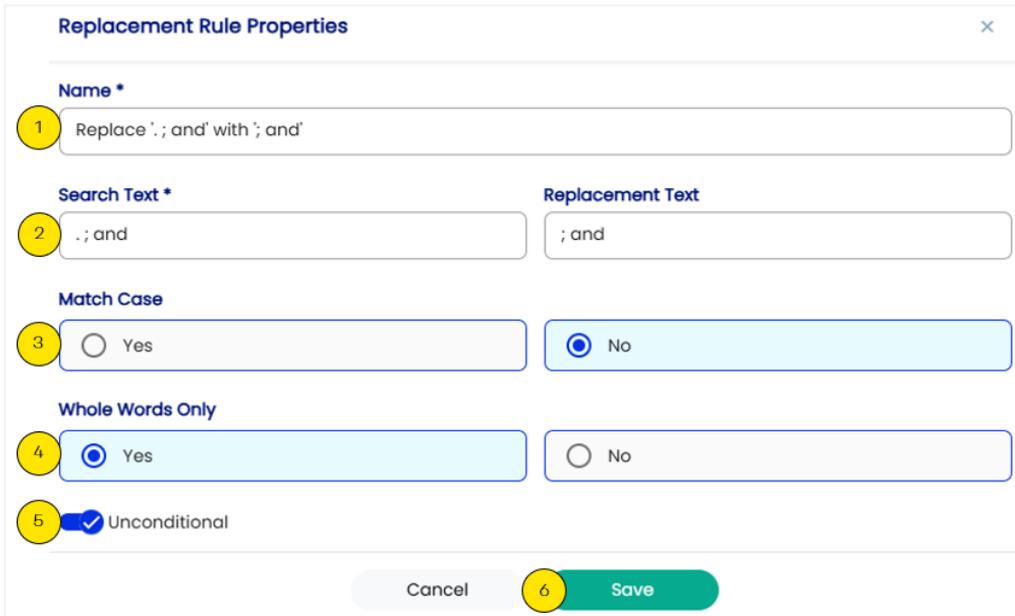To create replacement rules:

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

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**.

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 [merge field](#) 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.

		Name	Search Text	Replacement Text	Match Case	Match Whole Words	1	2	3
☐	=	Replace '.; and' with '; and'	.; and	; and	No	No	✏	⊞	🗑
☐	=	Replace '; and' with '; and'	; and	; and	No	No	✏	⊞	🗑
☐	=	Replace '.; and' with '; and'	.; and	; and	No	No	✏	⊞	🗑
☐	=	Replace '.; with ';'	.;	;	No	No	✏	⊞	🗑
☐	=	Replace ';' with ';'	;	;	No	No	✏	⊞	🗑
☐	=	Replace '.;' with ';'	.;	;	No	No	✏	⊞	🗑

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).