



Use Conditional Rules

Help Guide

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1. Using Conditional Rules

Conditional rules (also referred to as rules) are created to control how the document handles multiple choice answers that the user provides in a form.

Option sets are created in the form and are then available to use via the Smarter Drafter Microsoft Word Add-In. In a Word template, you wrap the conditional rule around the text and fields that needs to be included if the criteria of the rule have been met.

Conditional rules are crucial in instructing the document on what to do with answers that create a branch in the form content – one answer will trigger the inclusion of conditional rules A. and a different answer will trigger the inclusion of conditional rules B.

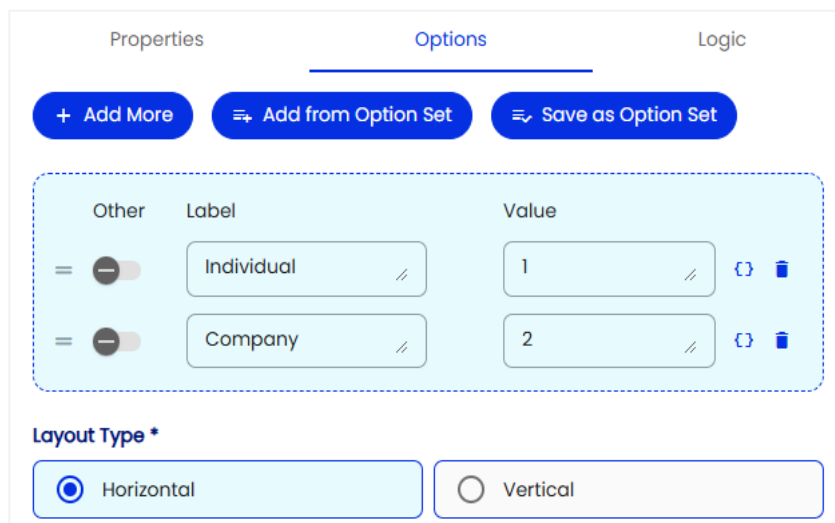
2. Example: Two Types of Entities

In this example, a set of conditional rules will be created to manage data entered for the question, "Are you an individual or a company?". There are two radio button options for form fillers to choose from; depending on their choice, they will be presented different fields that are relevant to their response: for an individual person a name will be requested, or a business name and ABN or business identifier if the entity is a company.

1.1 Create a Field with an Options Set

A conditional rule must be added to the form in the Smarter Drafter Web App before it is used in a Word template.

A new option set was added, asking the question: "Are you an individual or a company?". The available answers are **Individual** and **Company**. Add a radio button field with two options.



The screenshot shows the 'Options' tab in the Smarter Drafter interface. At the top, there are three buttons: '+ Add More', '⇌ Add from Option Set', and '⇌ Save as Option Set'. Below these is a table with two rows of options. Each row has an 'Other' column with a radio button, a 'Label' column with a text input, and a 'Value' column with a text input. The first row has the label 'Individual' and value '1'. The second row has the label 'Company' and value '2'. To the right of each value input are icons for a link and a trash can. At the bottom, there is a 'Layout Type *' section with two radio buttons: 'Horizontal' (selected) and 'Vertical'.




Other	Label	Value
<input checked="" type="radio"/>	Individual	1
<input type="radio"/>	Company	2

Layout Type *

☒ Horizontal ☐ Vertical




1.2 Add Fields to Capture Additional Data

For this example, the form requires a **name field**, **text field** for the business name and **ID Number field** was added to capture the ABN (or business identifier). The fields in this example are as follows:




Are you an individual or a company?
☐ =




100905894
☐ Individual
☐ Company

+ New Field




Name:
☐ =




100905895
Logic

+ New Field




Business name:
☐ =

100905896
Logic

+ New Field




ABN or business identifier:
☐ =

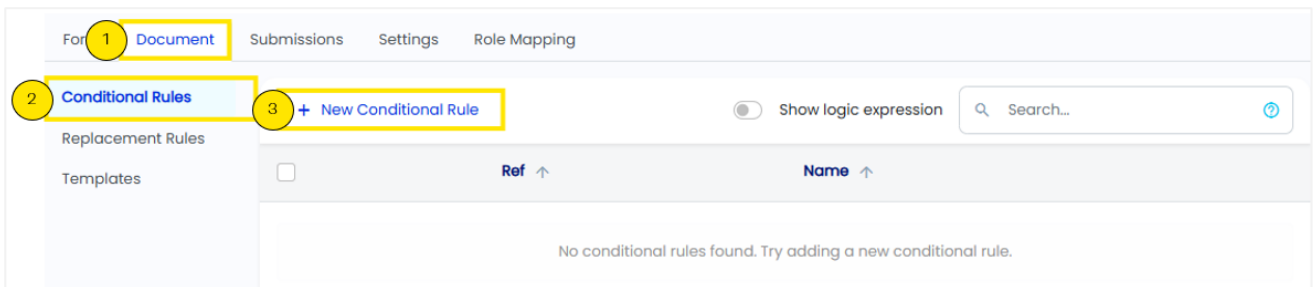
100905897
Logic

1.3 Create a Conditional Rule in the Form

Now, two conditional rules can be created - one for each of the options. This is how it's done.

With the required form open in the form builder:

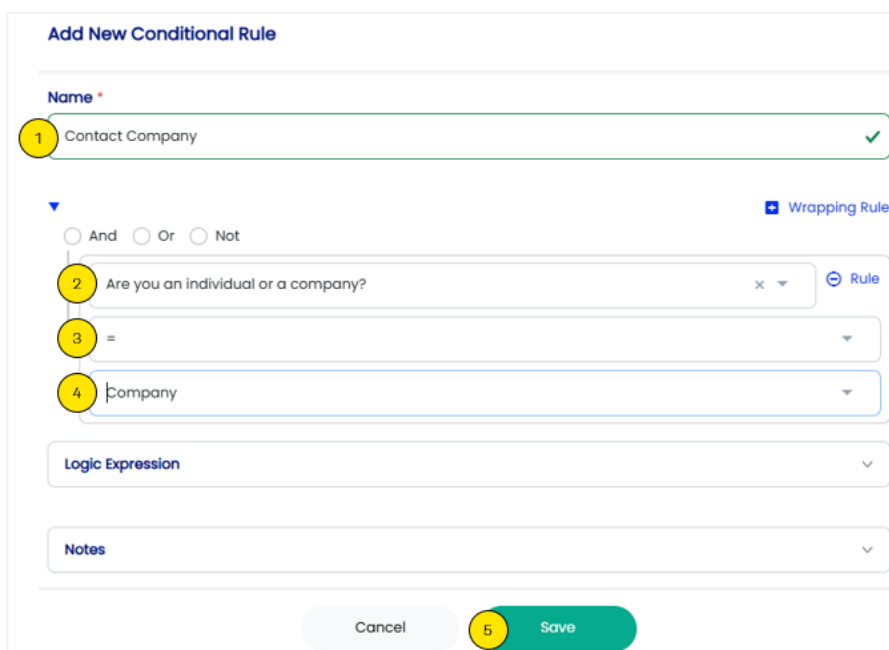
1. Open the **Document** tab.
2. Click **conditional rules**.
3. Click **New Conditional Rule**.



The screenshot shows the 'Document' tab selected in the top navigation bar. On the left sidebar, 'Conditional Rules' is highlighted. In the main area, the '+ New Conditional Rule' button is visible. Below it, a table header shows 'Ref' and 'Name'. A message at the bottom states: 'No conditional rules found. Try adding a new conditional rule.'

Two conditional rules are needed, one for each of the radio button options. When creating the first conditional rule:

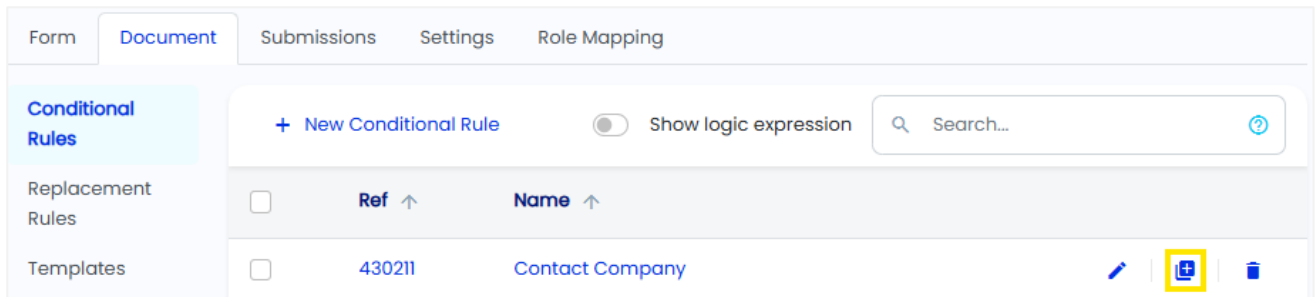
1. Give it a name that is logical and easily identified in a list.
2. Select the question it relates to.
3. Choose an operator. The operator in this case is "equal", which means the same as "is".
4. For this conditional rule, the answer is "Company".
5. Click **Save**.



The 'Add New Conditional Rule' dialog box is shown. The 'Name' field is filled with 'Contact Company'. Below it, a dropdown menu shows 'Are you an individual or a company?'. The operator is set to '='. The value field is filled with 'Company'. At the bottom, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a yellow circle.

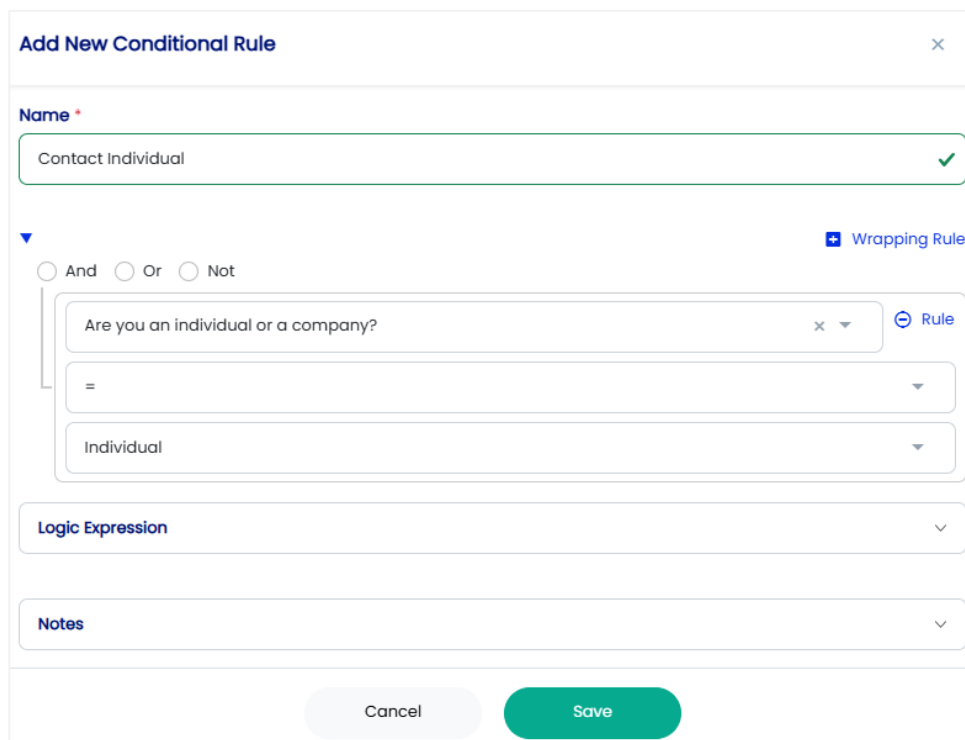
Note: The Notes area is a space where you can save developer notes for future reference.

The conditional rule is now in the list of conditional rules associated with this form. The **Clone a conditional rules** button can be used to make a similar conditional rules. We will now clone the conditional rules and modify it for the option "Individual".



Form	Document	Submissions	Settings	Role Mapping								
<div> + New Conditional Rule <input type="checkbox"/> Show logic expression <input type="text" value="Search..."/> </div>												
<table border="1"> <thead> <tr> <th></th> <th>Ref ↑</th> <th>Name ↑</th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>430211</td> <td>Contact Company</td> <td> ✎ 📄 🗑️ </td> </tr> </tbody> </table>						Ref ↑	Name ↑		<input type="checkbox"/>	430211	Contact Company	✎ 📄 🗑️
	Ref ↑	Name ↑										
<input type="checkbox"/>	430211	Contact Company	✎ 📄 🗑️									

The name of the conditional rule is **Contact_Individual** - the name reflects its relationship to the other option, and it is identifiable in a list. This conditional rules refers to the same question, but the variable answer is "Individual". When it is set up, click **Save**.



Add New Conditional Rule

Name *

Contact Individual ✓

☒ Wrapping Rule

☐ And
 ☐ Or
 ☐ Not

Are you an individual or a company? x ▼

=

Individual ▼

Logic Expression ▼

Notes ▼

[Cancel](#)
[Save](#)

There are now two conditional rules in the list associated with this form.

Form

Document

Submissions

Settings

Role Mapping

Conditional Rules

Replacement Rules

Templates

+ New Conditional Rule

Show logic expression

Search...

<div></div>	Ref <div></div>	Name <div></div>	
<div></div>	430211	Contact Company	<div><div></div><div></div><div></div></div>
<div></div>	430212	Contact Individual	<div><div></div><div></div><div></div></div>

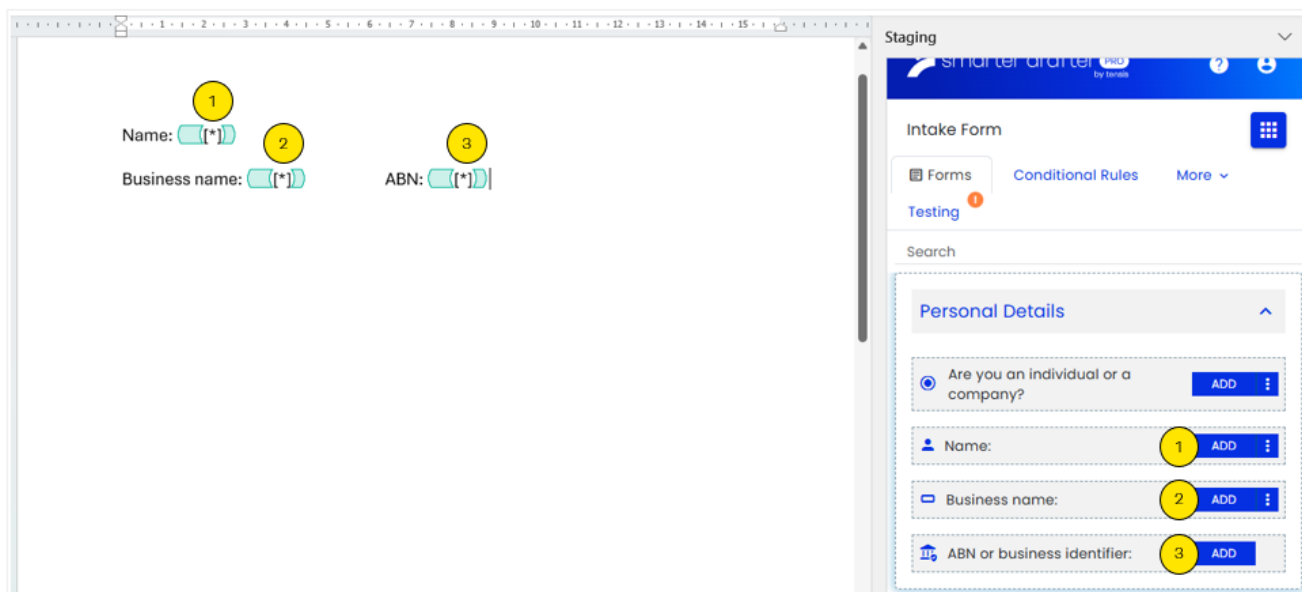
3. Use Conditional Rules in a Document Template

We can now implement the conditional rules in a document template.

In this example, while signed in to the **Smarter Drafter MS Word Add-In**, start by adding the fields to the word document. Open the **Forms** tab and add the fields to the document template:

1. Add **Name** data by positioning the cursor on the page and clicking **Add** beside the required field.
2. The same will be done for the **Company** field.
3. The same will be done for the **ABN** field.

When complete, the form will look as follows:



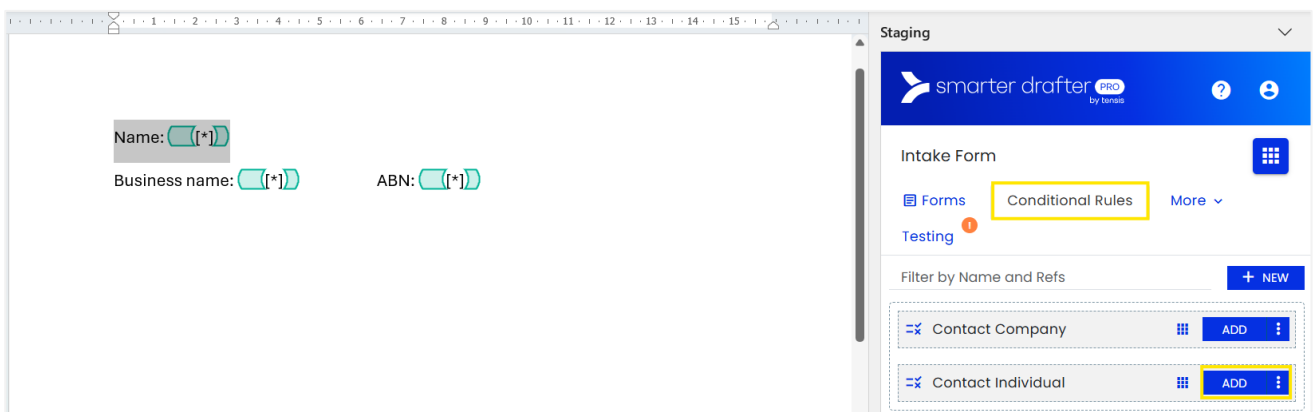
The screenshot shows the Smarter Drafter MS Word Add-In interface. On the left, a document template is displayed with three fields: "Name: (*)", "Business name: (*)", and "ABN: (*)". Each field has a yellow circle with a number (1, 2, 3) next to it. On the right, the "Staging" panel is visible, showing the "Intake Form" and a list of fields to be added to the document. The fields are: "Are you an individual or a company?", "Name:", "Business name:", and "ABN or business identifier:". Each field has a yellow circle with a number (1, 2, 3) next to it and an "ADD" button.

1.4 Add the Conditional Rule Wrapping

Since this is an either/or question and only one line of the document will be needed, these lines need to be wrapped in the conditional rules that were saved in the **conditional rules list**.

Open the **conditional rules** tab. To wrap a field in a conditional rules:

1. Highlight the **label and field** in the document (all the content that needs to be included).
2. Use the **Add** button on the rule that is to be used. In this example, the name will be wrapped in the **Contact_Individual** rule.



The screenshot shows the Smarter Drafter interface. The main document area contains the following text:

Name:

Business name: ABN:

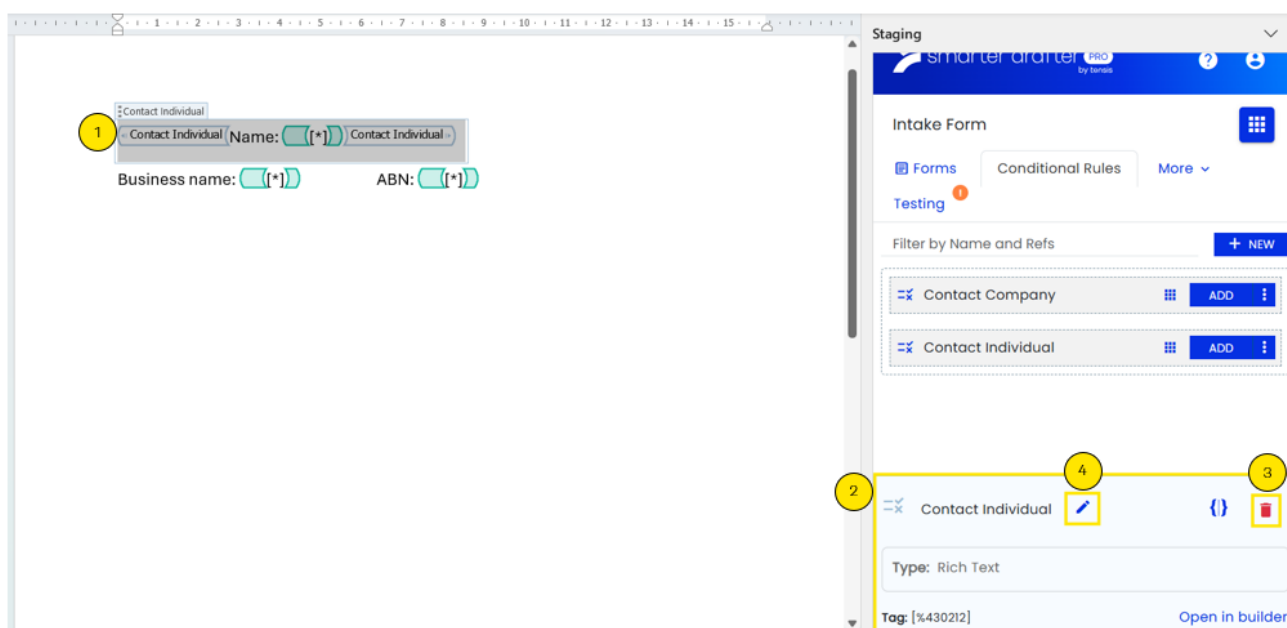
The sidebar on the right is titled "Staging" and contains the following elements:

- Logo: smarter drafter **PRO** by tensis
- Intake Form section with tabs: Forms, Conditional Rules (highlighted), and More.
- Testing section with a red notification icon.
- Filter by Name and Refs section with a + NEW button.
- Conditional Rules list:
 - Contact Company: ADD button
 - Contact Individual: ADD button (highlighted)

1.5 Manage the Conditional Rule

The document will now appear as follows.

1. The content controls have been wrapped around the content (name).
2. There is a content control manager pop up in the bottom. It identifies the conditional rules by name.
3. To remove the content control from the content, click the delete button (the trash can) in the manager.



4. The edit button (the pencil) opens a Conditional Rule Properties pop up. In this pop up, the properties of the conditional rules can be reviewed.

Conditional Rule Properties

Contact Individual

☐ And
☐ Or
☐ Not

Are you all

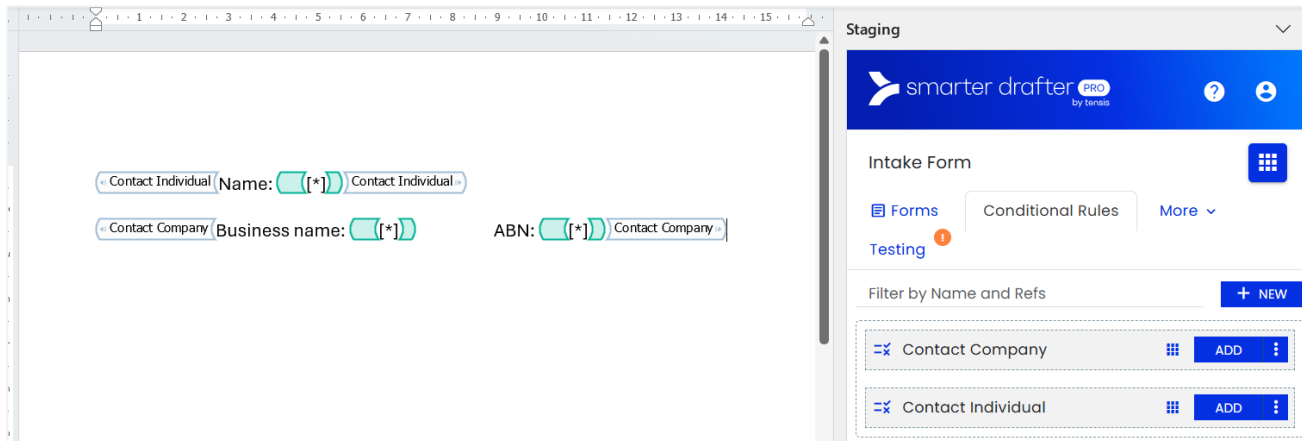
Save
Cancel

Note: It's **not** recommended to edit the conditional rules properties in this pop up.

1.6 Add the Second Conditional Rule

Follow the process to add a conditional rules to the Company and ABN. There are two fields in this conditional rules, so both fields and their labels will be highlighted. The **Contact_Company** conditional rules can then be added with the **Add** button.

The conditional rules are now in place. We can upload the template and test the form.



The screenshot displays the Smarter Drafter interface. The main workspace shows two conditional rules: **Contact Individual** with a highlighted **Name: (*)** field, and **Contact Company** with highlighted **Business name: (*)** and **ABN: (*)** fields. The right sidebar, titled **Staging**, contains the **Intake Form** section with tabs for **Forms**, **Conditional Rules**, and **More**. Below these is a **Testing** section with a **Filter by Name and Refs** dropdown and a **+ NEW** button. A list of conditional rules is shown, including **Contact Company** and **Contact Individual**, each with an **ADD** button.

In this example, the conditional rules **Contact_Individual** has enclosed a field for an individual's name. If the button for Individual is not selected in the form, these details will not be included in the document.

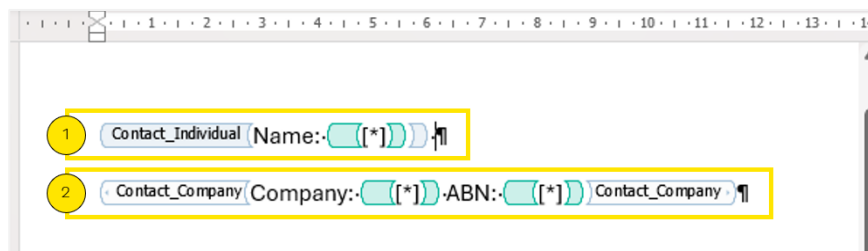
The conditional rules **Contact_Company** has enclosed a field for an ABN. If the button for Company is not selected in the form, these details will not be included in the document.

4. Content Control Types

There are two types of content controls: a solid control or an outline control. The two conditional rules in this example appear in outline control mode when first added to the document. To convert the control to a solid colour control, click the space bar after the control is placed. To convert it back to an outlined content control, place cursor *inside* the content control, press enter, then delete.

The difference between the two types of controls is the way the formatting within the conditional rules is treated. With a solid colour conditional rules, formatting will remain, whether or not the field brings in data.

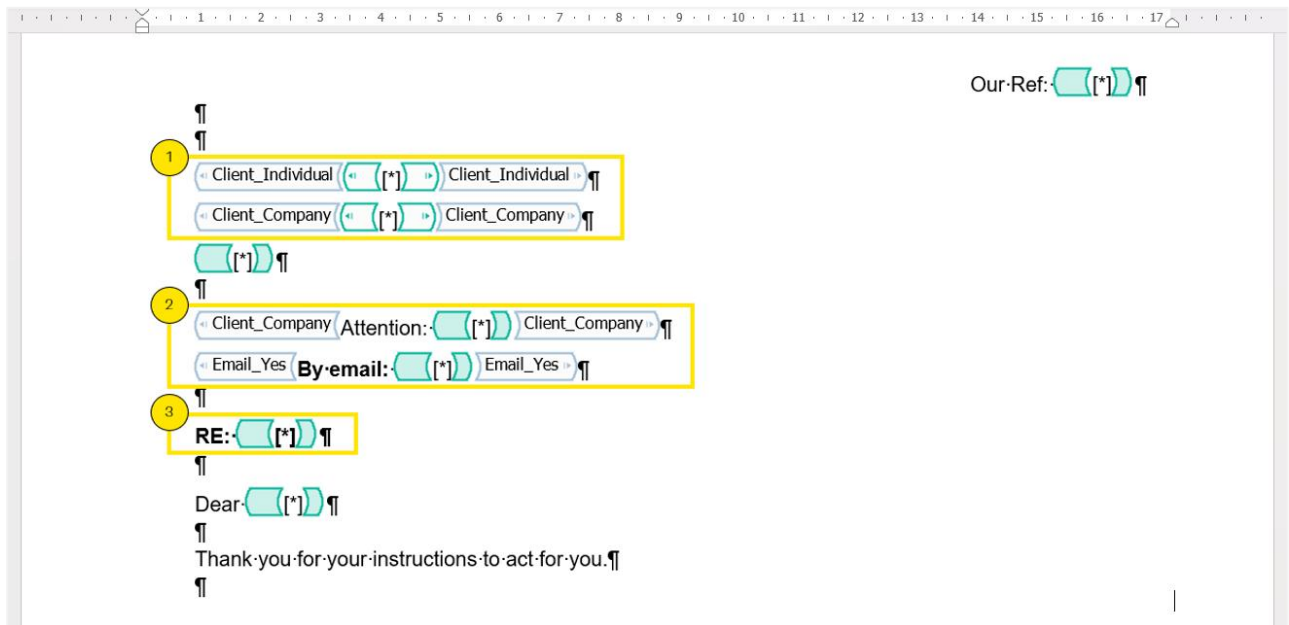
Let's look at the example again with paragraph marks showing:



1. The **Contact_Individual** has a solid content control wrapped by a solid conditional rule, with a paragraph return. This paragraph return **will** be included if the conditional rules is not included, so the line will be included and it will simply be a blank line.
2. **Contact_Company** has a solid content control wrapped by an outlined conditional rule. There's a paragraph return after the conditional rules. If the fields are not filled out and the conditional rules is not included, this line will disappear.

1.7 Conditional Rules in a Letter

The functions of solid and outlined content controls need to be understood – let's look at how they work in a more complex scenario: a letter.



1. For content controls wrapped in **outlined** conditional rules:
The line will be completely removed from the document if the corresponding form field is not filled in.
2. For content controls wrapped in **solid** conditional rules:
The line will remain in the document, but it will be blank if the corresponding field is not filled in.
3. **A solid content control.** The paragraph return will remain, creating a blank line in the document if the corresponding field is not filled in.
4. **An outline content control.** The paragraph return will be removed, ensuring a blank line is not left in the document if the corresponding field is not filled in.



Doesn't include formatting

Paragraph mark will remain, whether or not the field brings in data.

To convert, place cursor inside the content control and press enter, then delete.



Includes formatting

Paragraph mark will be removed if the field doesn't bring in data.

To convert, place cursor beside the content control and press space, then delete.