smarter drafter PRO
by tensis

Using Content Blocks

Help Guide

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1. Using Content Blocks

A content block is a reusable Word document that can be inserted within the body of a standard template. A content block ensures consistency across content and formatting in the documents where it's used, facilitating faster review and approval processes. They also help maintain a standard quality for all documents.

Any change to a content block is instantly replicated across all documents where it has been used, ensuring uniformity.

## 1.1 How Content Blocks Interact with Section Blocks

It isn't mandatory for a section block to have an associated content block - this is completely optional. Even where a section block has a content block, the questions and fields of the section block can be used without the content block having to be used.

Alternatively, you can use a content block simply to store content in one place, where it can easily be maintained. In this instance, you can use a section block with a hidden heading and a hidden field (for example: today's date) and then attach the content block. This allows you to pull in the content of the content block without asking unnecessary questions.

1.2 Set up a Content Block in Microsoft Word

In this example, a content block will be created with an associated section block.

1. Open **MS Word** with the **Smarter Drafter Word Add-In**. Drop down the **Section Blocks** list in the Word Add-In and find the section block that you require (in this example, the section block is called Client Details).
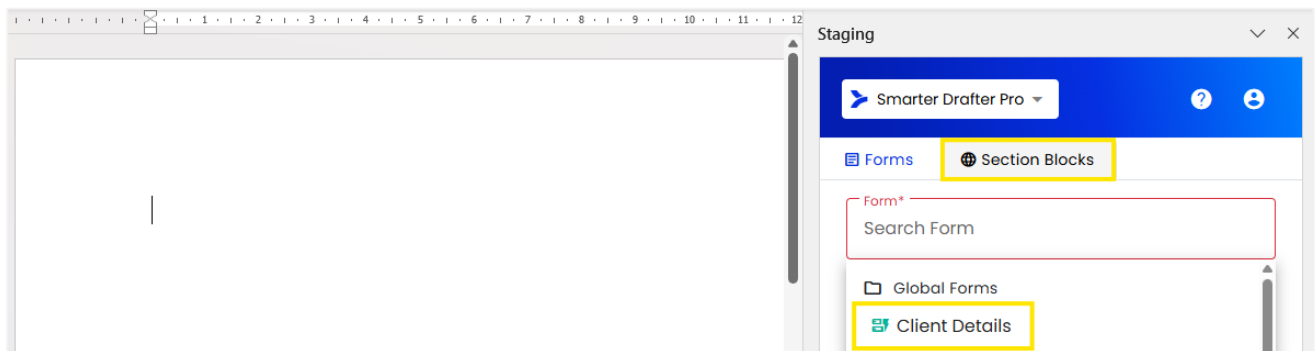
2. If the form isn't visible right away, refresh the window by clicking on the **waffle button** and selecting **Refresh Form**.
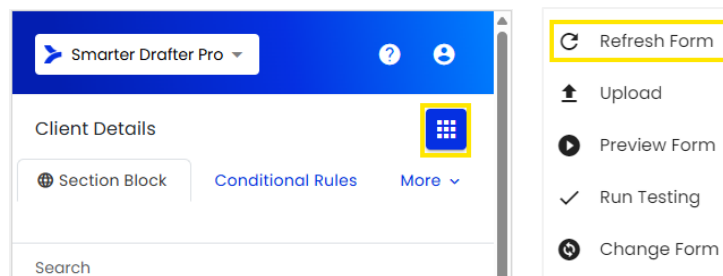
3. The **section blocks** fields are now in the panel, available to be added to the document.
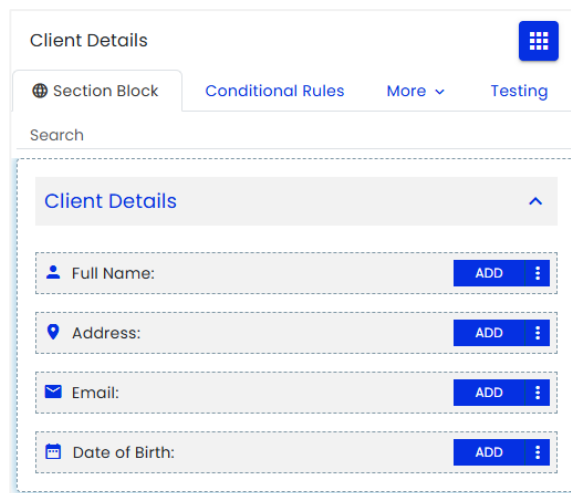
You will now need to set up the shell of the document. In this example, the text component of the document is simply a list of labels to identify the fields. The Word document looks like this:
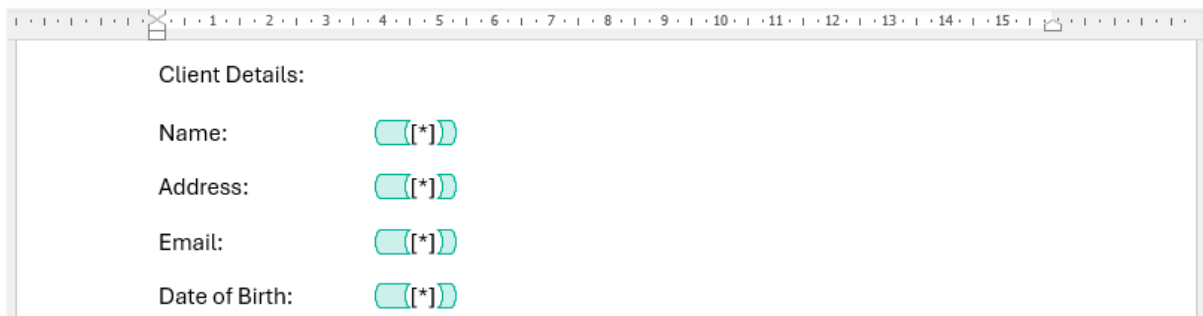

Now we need to drop in the data – this is the same as a standard form and standard template. Place the cursor where the field data is required in the Word document.

Click the blue **ADD** button beside the required piece of data in the Smarter Drafter MS Word Add-In.

An **asterisk [*]** symbol will appear, which indicates the data has been dropped in place. The document will have green design indicators. When complete, the Word document will look like this:
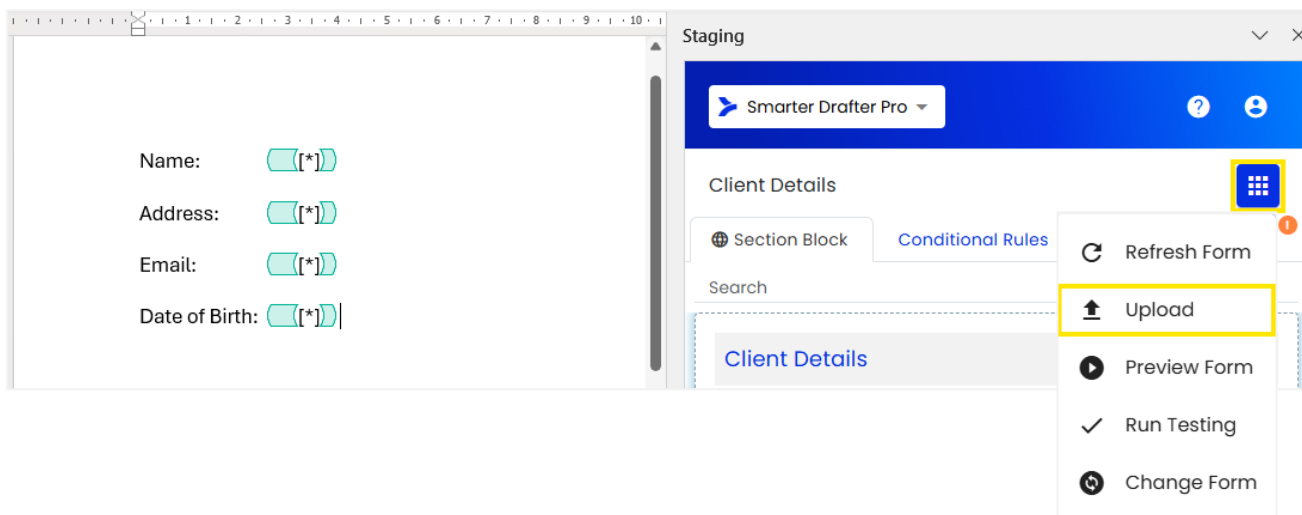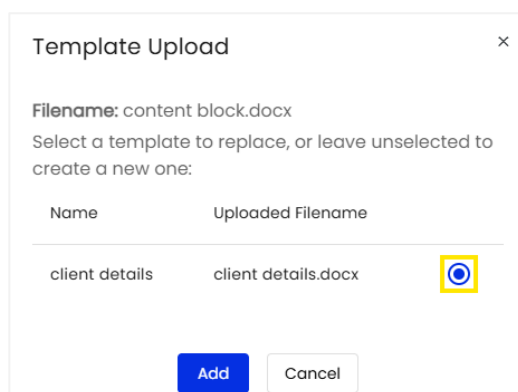
1.3 Upload the Content Block

To upload via the Smarter Drafter Word Add-In, immediately after you save the document:
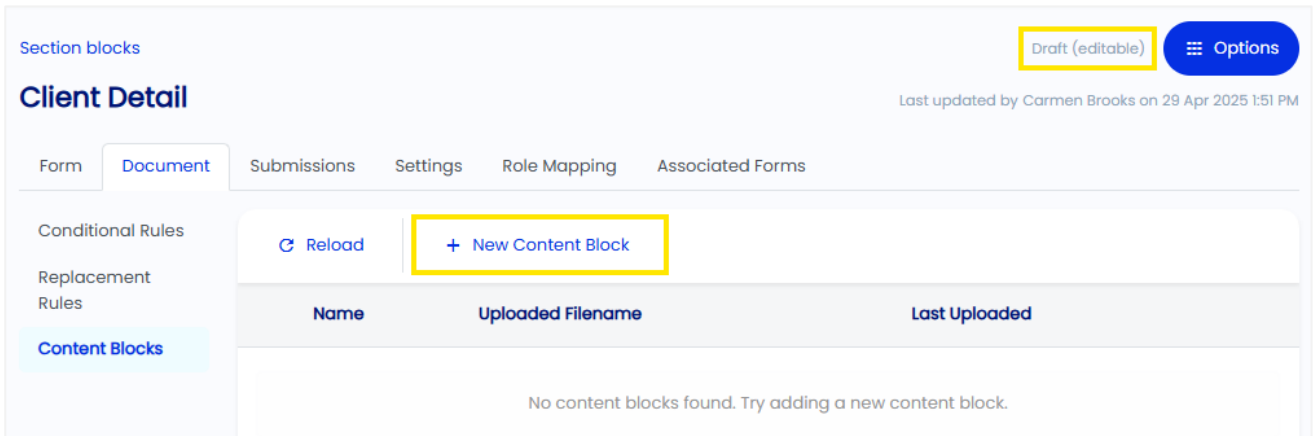
1. Click the waffle button.
2. Click Upload.

3. Select the document from the pop-up window and click **Add**.

1.4 Upload the Content Block via the Web App

Alternatively, the content block may be uploaded to the web application from the **Application Settings**. Open the section block and ensure that it is in draft mode, and click **New Content Block**.
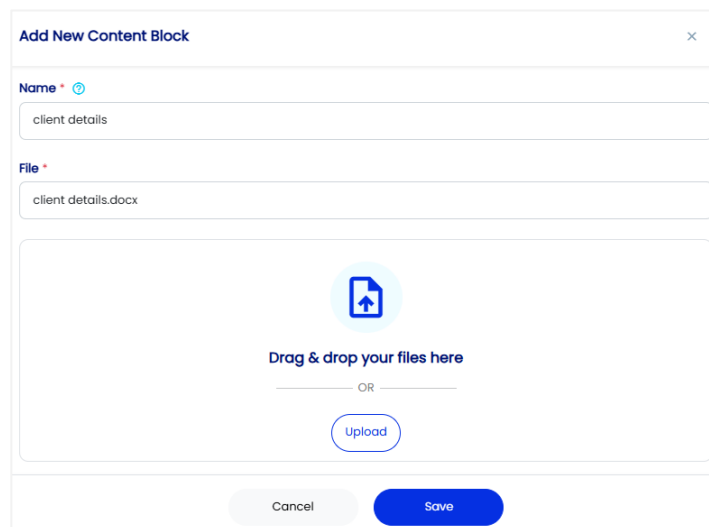
Find the content block in its saved location and upload it in the **Add New Content Block** pop-up.
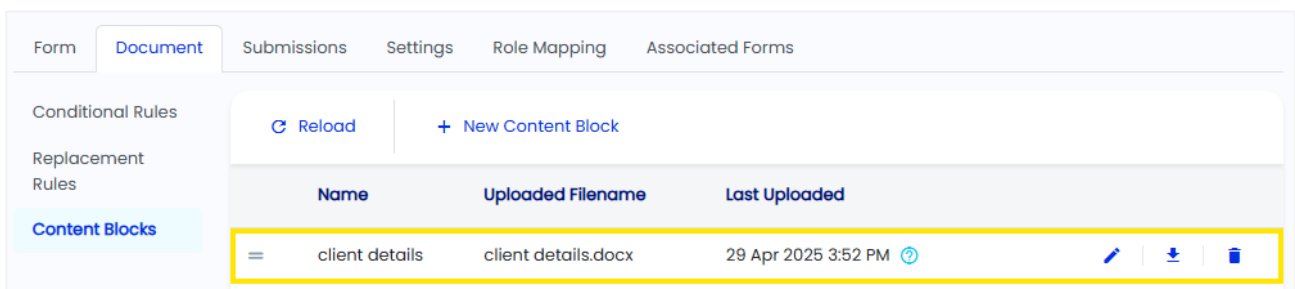

The content block will appear in the list.

1.5 Publish the Section Block in the Web Application

Before the section block can be used, it must be published. Navigate back to **Application Settings** and open the **section block** you are working on.

1. Click the **Waffle.**
2. Click **Publish and Create Draft.**
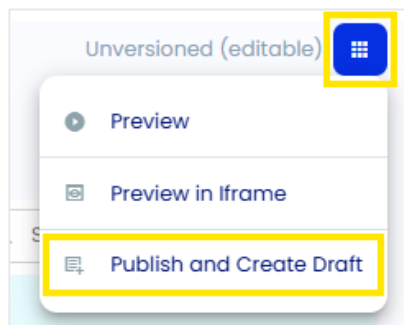
2.   Test the Section Block

The section block is now set up with a content block and it can be tested in a Word document. We can test the section block in **Preview mode**, as we would with a standard form.

2.1 Inserting the Content Block into your Standard Document Template

Insert the content block into a standard template from the Smarter Drafter MS Word Add-In.

Here's an example:

Open the standard template in Word and log in to the Smarter Drafter MS Word Add-In. To insert the content block into the Standard Form, do the following:

1. Place your cursor where you need the content of the content block inserted.
2. Click on the **More** tab.
3. Click **Content Blocks**. This will bring up a list of available content blocks.
4. Click **ADD** on the content block required, and it will be dropped into the document.
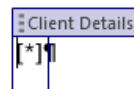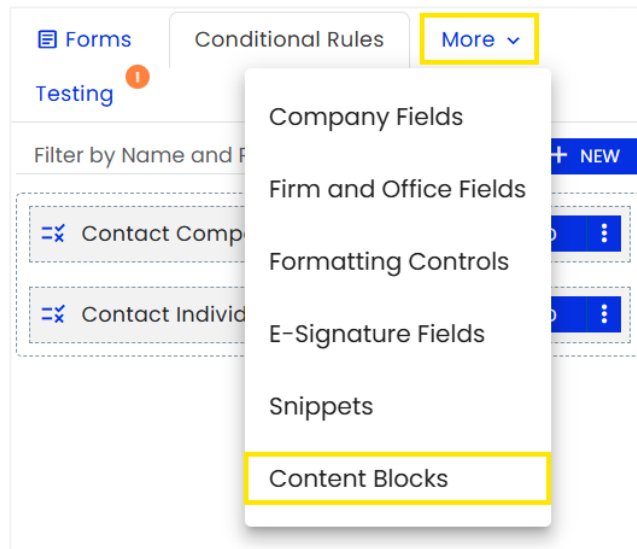
An asterisk [*] will be dropped into the document, like this:

2.2   About Section Blocks and Content Blocks

A section block can be created with or without a content block. In the list of section blocks there are icons to differentiate between the two kinds of section blocks:

🌐	Forms *with* content blocks: These forms will be identified using the green icon. A section block with a content block is used when the data captured will be presented exactly the same across all the standard forms it is inserted into.
🌐	Forms *without* content blocks: These forms will be identified using the blue icon. A section block without a content block is used when the data captured will be presented differently across the forms it is inserted into.