smarter drafter PRO

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Using Dynamic Snippets

Help Guide

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1. Using Dynamic Snippets

A Dynamic Snippet is a reusable Word document that can be inserted within the body of a standard template. A Dynamic Snippet 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 brand quality for all documents.

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

1.1 How Dynamic Snippets Interact with Global Forms

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

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

1.2 Set up a Dynamic Snippet in Microsoft Word

In this example, a Dynamic Snippet will be created with an associated Global Form.

1. Open MS Word with the Smarter Drafter Word Add-In. Drop down the **Global Forms** list in the Word Add-In and find the Global Form that you require (in this example, the Global Form 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**.
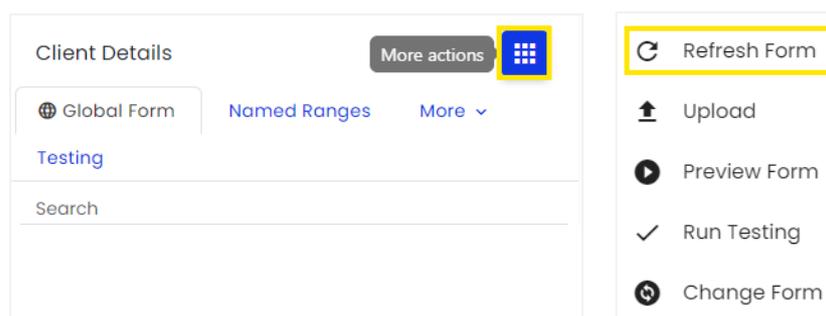
The **Global Forms** fields are now in the panel, available to be added to the document.
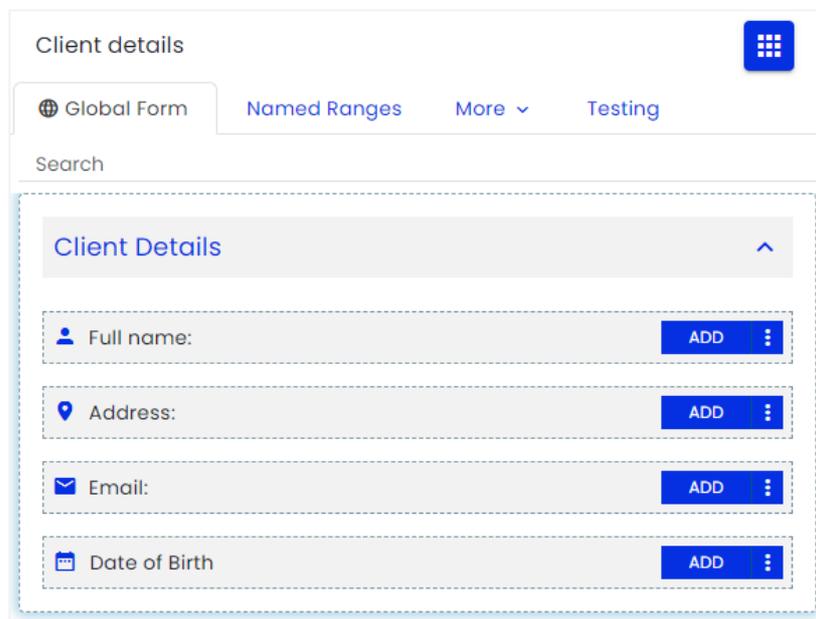
You will now need to set up the shell of the document. In this example, the text component of the document is simply a list of labels to identify the field data. The Word document looks like this:
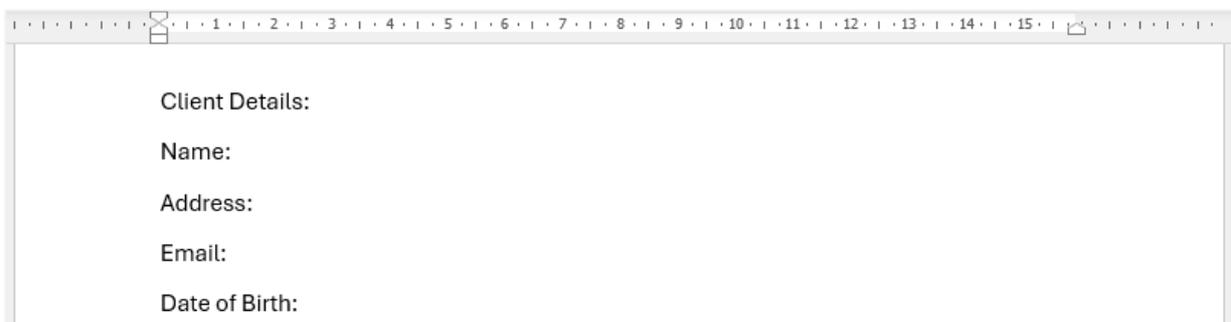
Now we need to drop in the data – this is the same as a standard form and standard template. Place the cursor where the field data is required in the Word document.

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 Dynamic Snippet

When the Dynamic Snippet is ready for use, upload it to the Global Form.

There are two ways to upload the Word document to the Global Form:

- Upload the document from the Smarter Drafter Word Add-In.
- Save this document locally and upload it via the web app.

1.4   How to Upload via the Word Add-In

To upload via the Smarter Drafter Word Add-In, immediately after you save the document:

1. Click the waffle button
2. Click Upload
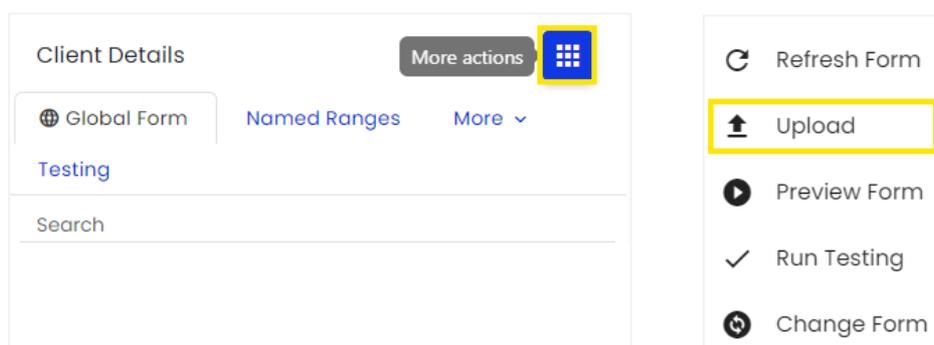
1.5   How to upload via the Web Application

Navigate back to **Application Settings** and open the **Global Form** you are working on. To upload the Dynamic Snippet, do the following.

1. Open the **Document** tab.

2. Click **Dynamic Snippets.**

3. Click **New Template.**

4. Find and upload the Dynamic Snippet Word document that you saved. After it is uploaded, it will appear in the uploaded file window.
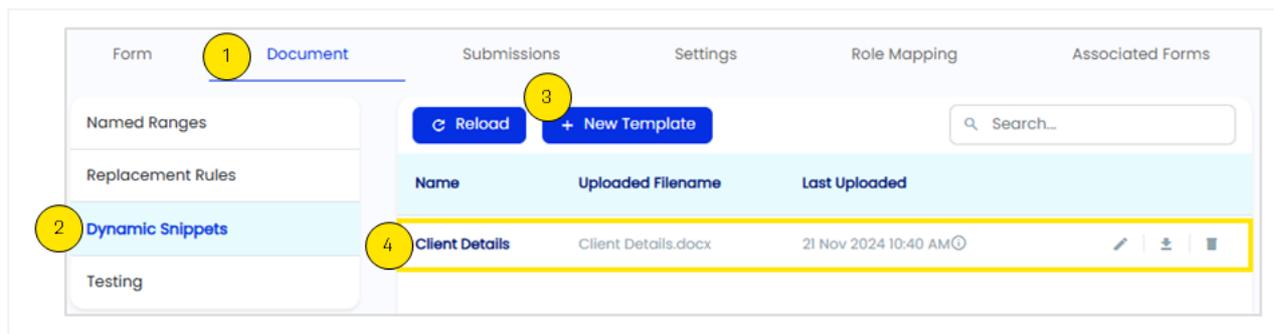
1.6 Publish the Dynamic Snippet in the Web Application

Navigate back to **Application Settings** and open the **Global Form** you are working on.

1. Click the **Waffle** and **Publish and Create Draft**.
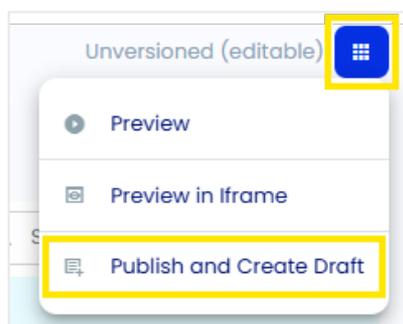
1.7 Test the Global Form

The Global Form is now set up with a Dynamic Snippet to text in from a Word document. We can test the Global Form in Preview mode, as we would with a standard form.

1.8   Inserting the Dynamic Snippet into your Standard Document Template

Insert the Dynamic Snippet 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 Dynamic Snippet into the Standard Form, do the following:

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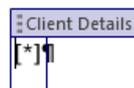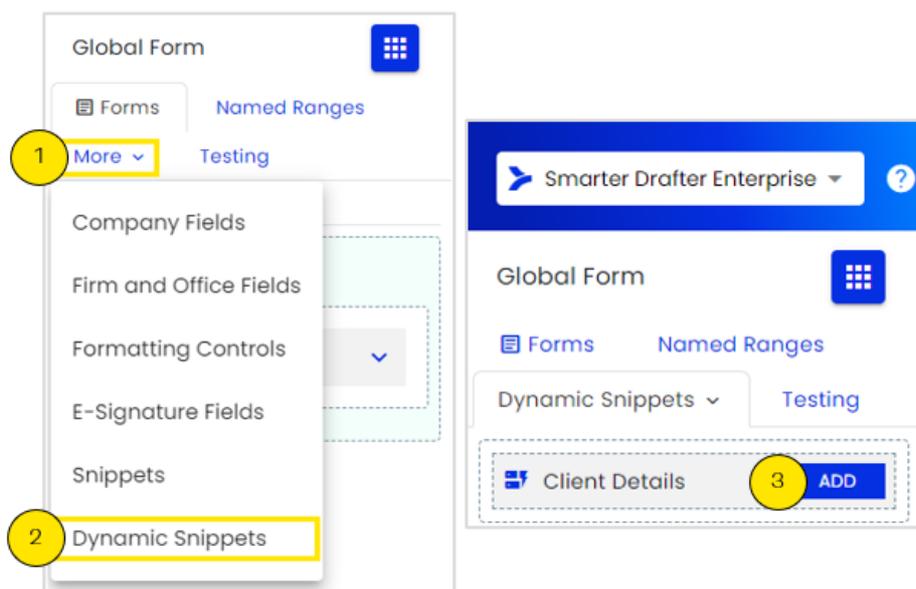
An asterisk [*] will be dropped into the document, like this:

1.9   About Global Forms and Dynamic Snippets

A Global Form can be created with or without a Dynamic Snippet. In the list of Global Forms there are icons to differentiate between the two kinds of Global Forms:

	Forms *with* Dynamic Snippets: These forms will be identified using the green icon. A Global Form with a Dynamic Snippet is used when the data captured will be presented exactly the same across all the standard forms it is inserted into.
	Forms *without* Dynamic Snippets: These forms will be identified using the blue icon. A Global Form without a Dynamic Snippet is used when the data captured will be presented differently across the forms it is inserted into.