



# Use Global Forms

Help Guide

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# 1. Global Forms

A Global Form is a reusable set of questions that can be applied across an unlimited number of automations. With this feature, automation builders only need to create a question set once and can then reuse it in other subsequent automations.

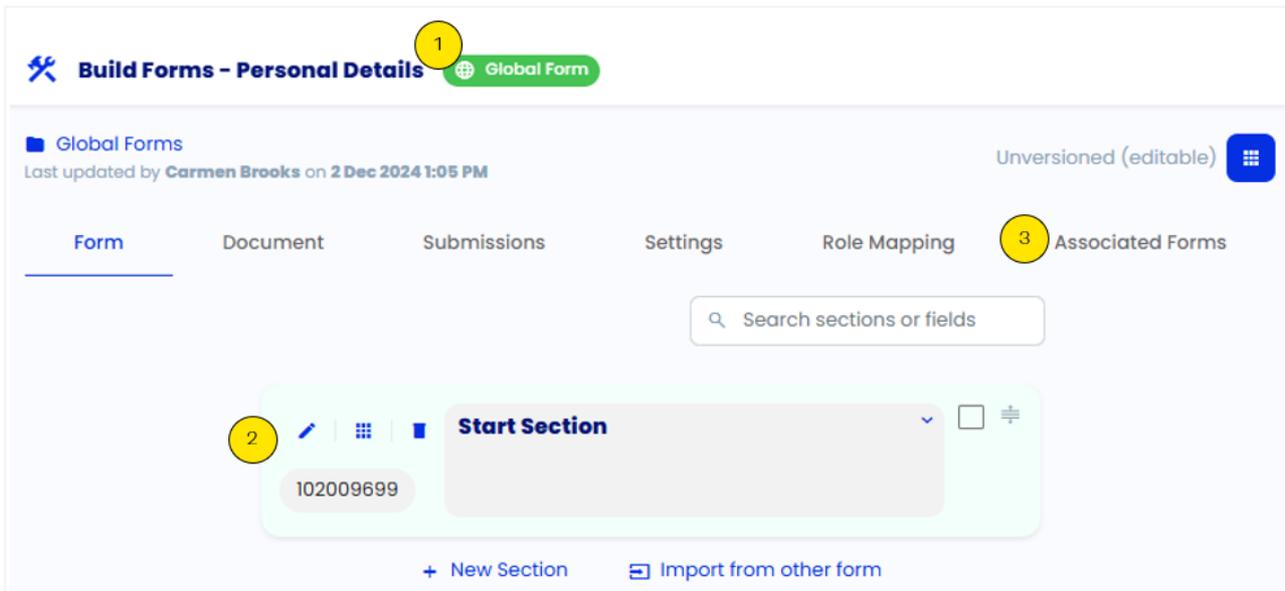
For instance, when creating a suite of court forms, every automation will require details on legal representation. Rather than building the same set of questions from scratch each time, Global Forms allow these questions to be developed once and then reused in other forms. Global Forms also preserve any guidance added to the form.

Global Forms have similar features to Standard Forms: sections, questions, logic etc. Any updates made to a Global Form will be reflected in all the forms they are inserted into, allowing you to make global updates in a single location.

## 1.1 Global Form Features

Global Forms are constructed in a similar way to standard forms.

1. They are colour-coded green with a Global Form label to distinguish them from Standard Forms.
2. Below is the **Global Form Builder** – note the mint green background.
3. The **Associated Forms** tab will display all the forms the Global Form is used in.



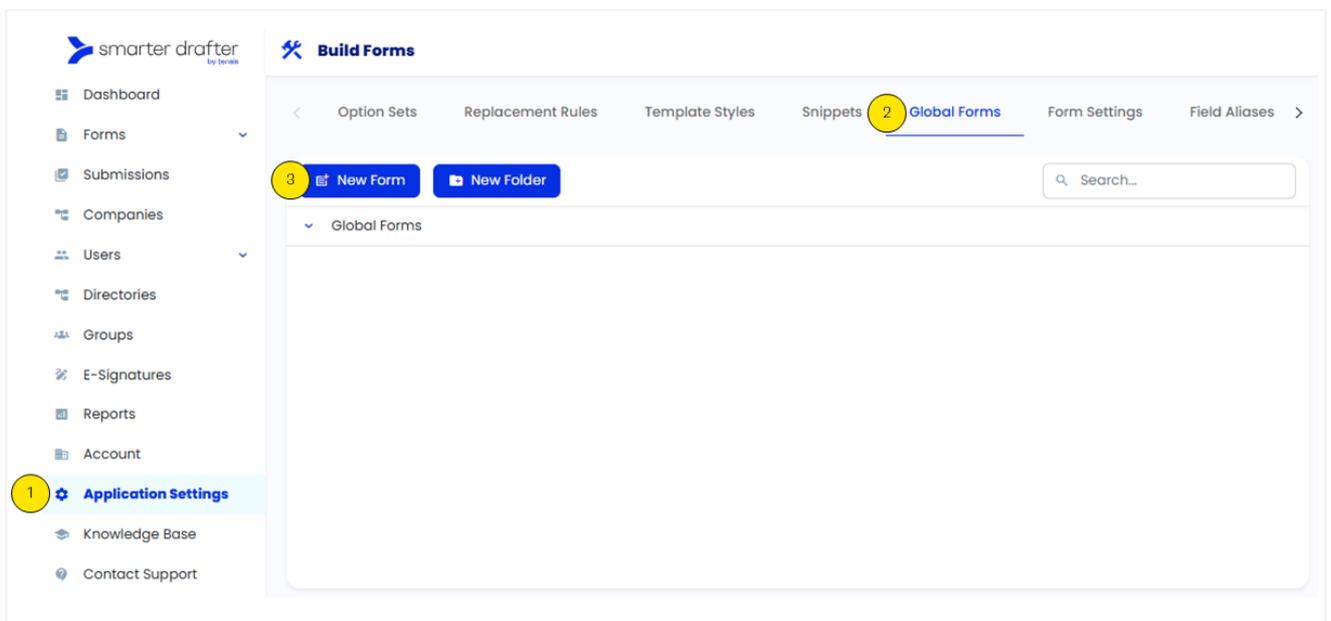
## 2. Creating a New Global Form

Creating a Global Form is a similar process to creating a Standard Form; however, Global Forms are organised under Application Settings.

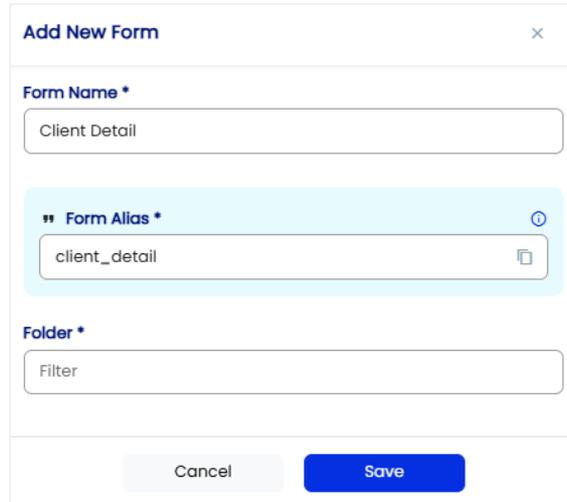
To access existing and/or create a new Global Form, navigate to the Global Forms Builder.

1. Click **Application Settings**.
2. Click **Global Forms**.
3. Click **New Form** to create a new Global Form.

Global Forms are organised in folders, like Standard Forms.



When you click **New Form**, a pop-up will appear for you to enter the Form Name and Form Alias. Select an appropriate folder in which to save the form.



The image shows a dialog box titled "Add New Form" with a close button (X) in the top right corner. It contains three input fields: "Form Name \*" with the value "Client Detail", "Form Alias \*" with the value "client\_detail" and a trash icon, and "Folder \*" with the value "Filter". At the bottom, there are two buttons: "Cancel" and "Save".

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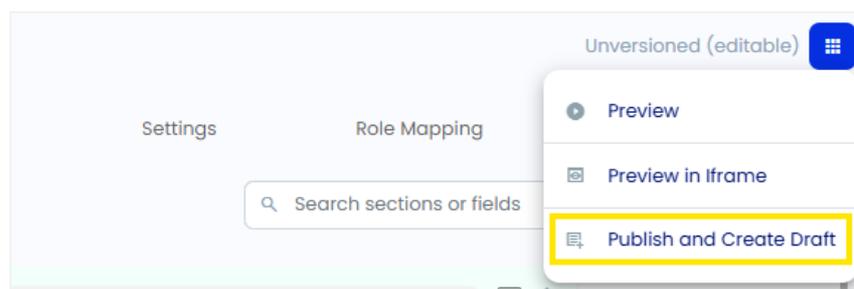
**Note:** All Form Names and Form Aliases must be unique.

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## 2.1 Map Fields to Contacts and Roles

A Global Form field can be mapped to a contact or user, enabling the data related to that contact or user to be automatically populated. The process is the same as a standard form. See the **Contact and User Mapping Help Guide** for instructions.

When this part is done, click the Waffle button and click **Publish and Create Draft**.



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**Note:** Role Mapping must be done at the Global Form level and will apply to all the forms the Global Form is embedded into. It's not possible to map roles in a standard form. This one of the ways Global Forms will empower you to work smarter and eliminate the need to rekey basic data.

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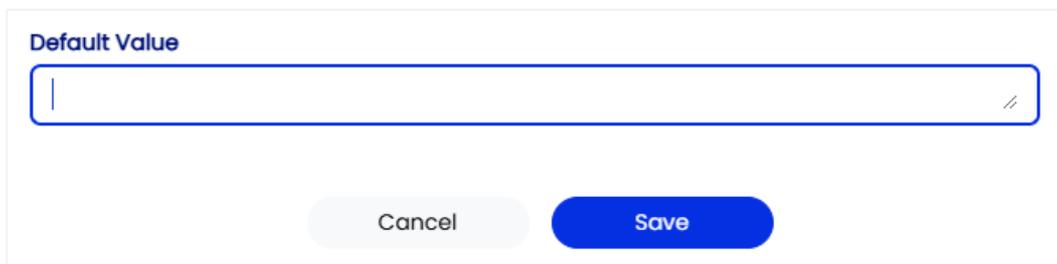
## 2.2 Repeating Content and Named Ranges

Global Forms can include repeating content, similar to a standard form. Simply create a new section and tick the box to make it a repeating section. Create a repeat named range so that it's ready to use in the template. Named ranges will automatically transfer across to forms that use the Global Form.

## 2.3 Fields with a Default Value

Fields can be added with default text or a default value. This feature can eliminate the need to rekey data in forms where values are predictable. For example, a standard transfer fee field can be prefilled in the Global Form, which will populate across every form the Global Form is used in. If that fee changes, you will need to update it only once. The same result can be achieved for text, such as rules or conditions that are mentioned in every document.

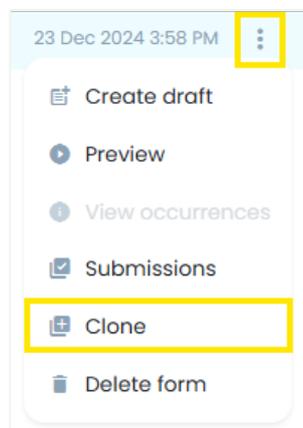
To implement this feature, use the Default Value field when adding a new field.



The image shows a dialog box titled "Default Value". It contains a text input field with a vertical cursor. Below the input field are two buttons: "Cancel" and "Save".

## 2.4 Cloning a Global Form

Global Forms can be cloned, like standard forms. In the Global Forms list in Application Settings, click the ellipsis and select **Clone**.



## 2.5 Logic

Logic can be applied to a Global Form, so the Global Form is included in the standard form only if required. Click the **Add Logic** button in the banner of the Global Form.



## 2.6 Reusable Questions

A Global Form can serve a set of reusable questions, where the fields are inserted into templates like they are in a standard form. The benefit is a single set of questions, available to reuse and manage in one place.

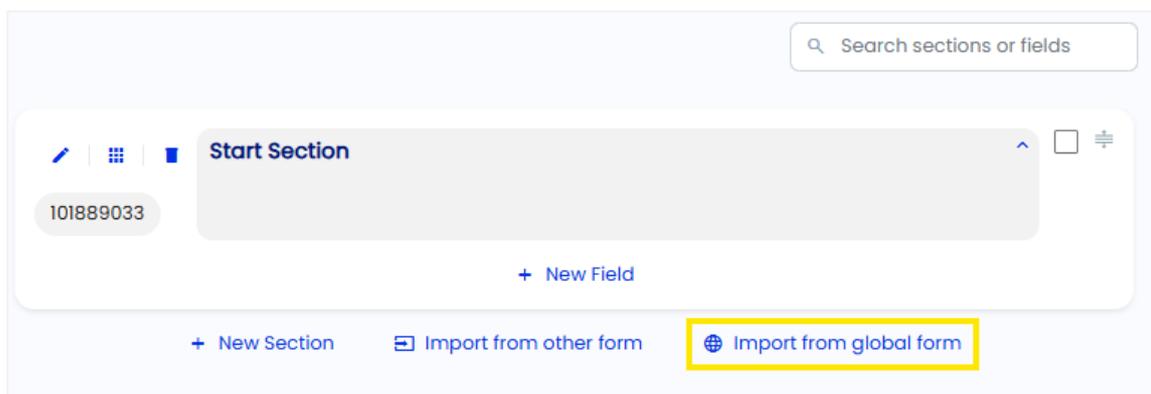
## 2.7 Global Forms and Word Templates

A Global Form can be linked to a Word document – this is called a Dynamic Snippet. It gives you the ability to insert text and images into your template from a completely separate Word document. It's like a template that sits inside your template. This is optional, and instructions on how to implement this are provided in the [Dynamic Snippets Help Guide](#).

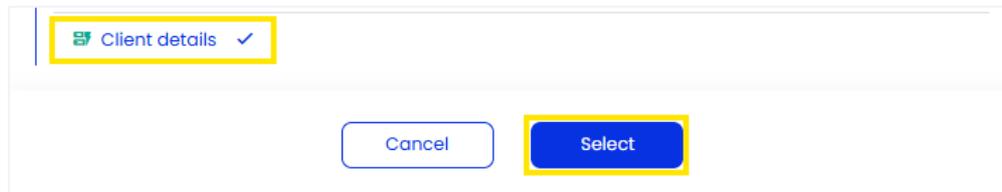
## 2.8 Import a Global Form into a Standard Form

A Global Form can be imported into a Standard Form. Create a new Standard Form, following the typical process.

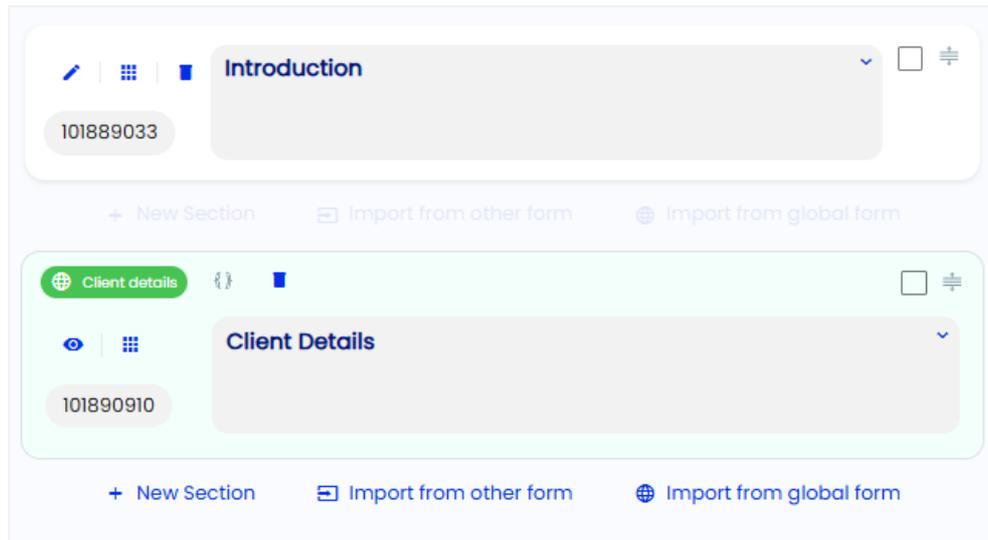
1. When you reach the Start Section page, click the **Import from global form** button in the workflow.



1. Select the **Global Form** from the list and click **Select**.



The global form is inserted into the form as a section. It's highlighted with a mint green background.



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**Important:** A Global Form cannot be edited from within a standard form. To edit, open it via Application Settings > Global Forms. Any edits made from there will automatically update the Global Form across all other forms where it's been used.

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