



# Use Named Ranges

Help Guide

Published: 16 January 2025

## Table of Contents

1.	Using Named Ranges.....	2
1.1	Creating a Named Range.....	2
1.2	Use the Named Range in a Document Template.....	5

# 1. Using Named Ranges

Named ranges (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 the Word document, you wrap the rule around the text that needs to come in if the criteria of the rule has been met.

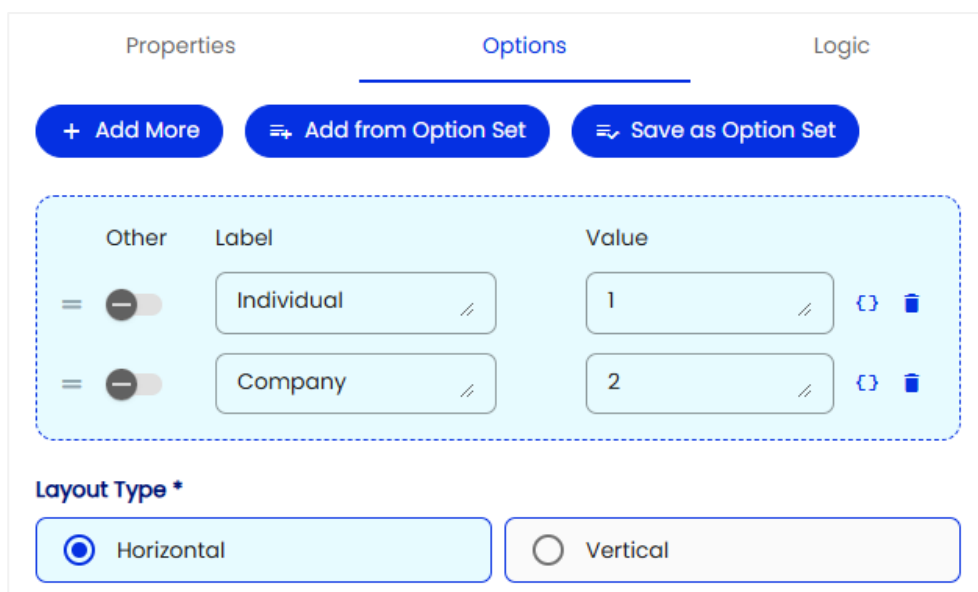
For example, you might have two rules to differentiate the text to appear if the user answers "No" versus different text if they've answered "Yes".

Named ranges are crucial in instructing the document on what to do with answers to the various types of selection fields.

## 1.1 Creating a Named Range

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

For this example, a new option set was added, asking the question: "Are you an individual or a company?". The available answers are **Individual** and **Company**. If the form filler is a company, we would add another field to request their ABN or business identifier.



The screenshot shows the 'Options' configuration tab in the Smarter Drafter web app. It features three main buttons at the top: '+ Add More', '⇨ Add from Option Set', and '⇨ Save as Option Set'. Below these is a dashed blue box containing a table of options. The table has three columns: 'Other', 'Label', and 'Value'. The first row shows a toggle switch set to 'Off', the label 'Individual', and the value '1'. The second row shows a toggle switch set to 'Off', the label 'Company', and the value '2'. Each row has a trash icon to its right. Below the table is a 'Layout Type \*' section with two radio buttons: 'Horizontal' (selected) and 'Vertical'.

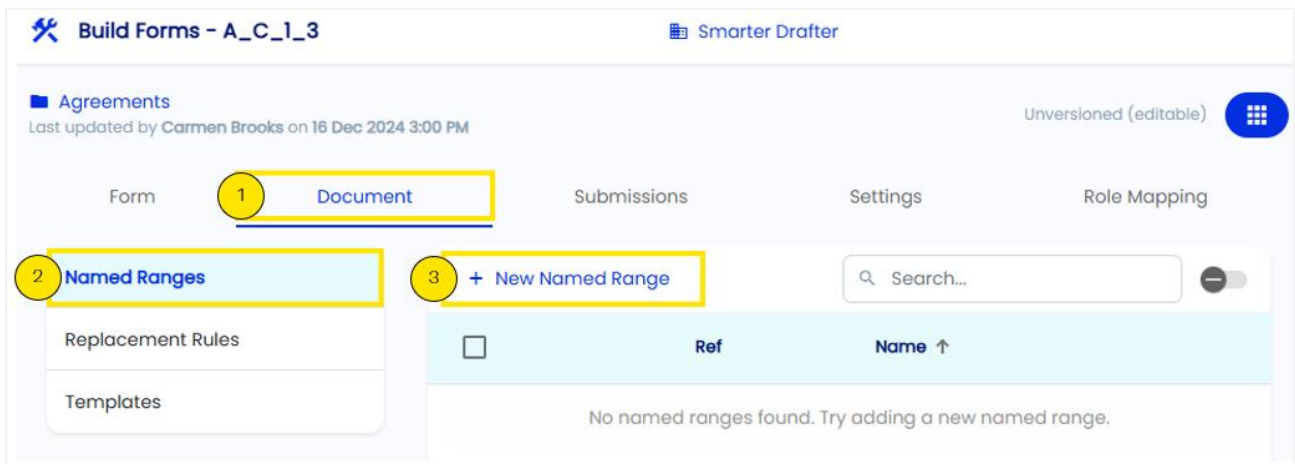
Other	Label	Value
<input type="checkbox"/>	Individual	1
<input type="checkbox"/>	Company	2

Layout Type \*

Horizontal  Vertical

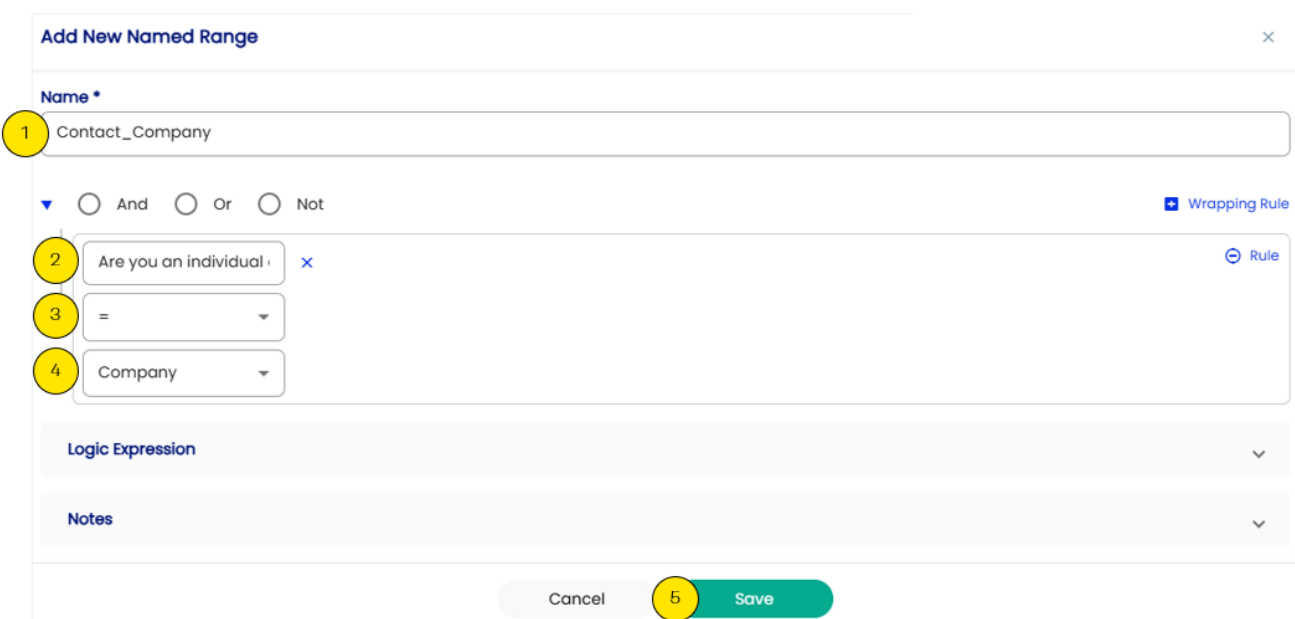
Now a named range can be created for each of these options. In the Form Builder:

1. Open the Document tab.
2. Click Named Ranges.
3. Click New Named Range.





When creating the named range:

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. The answer is "Company".
5. Click Save.



The Clone a Named Range button can be used to make a similar named range.


+ New Named Range			Search...	☰
<input type="checkbox"/>	Ref	Name ↑	Clone a Named Range	
<input type="checkbox"/>	1214141	Contact_Company		

This named range refers to the same question, but the variable answer is "Individual". The named range has a name that reflects its relationship to the other option, and it is identifiable in a list.

**Add New Named Range** ×

**Name \***

Contact\_Individual

And
  Or
  Not
 

Are you an individual ×

=





Individual

**Logic Expression** ▼

**Notes** ▼

Cancel
Save

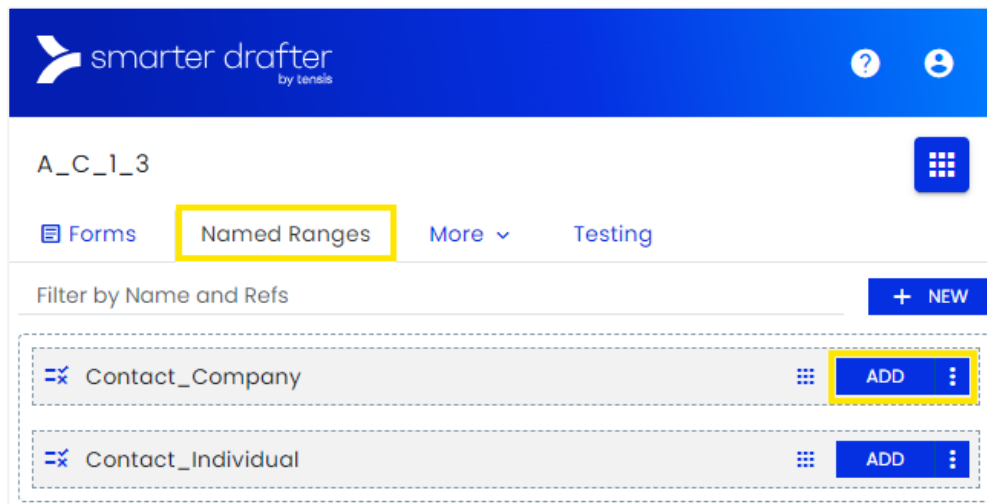
There are now two named ranges associated with this form.

+ New Named Range			Search...	☰
<input type="checkbox"/>	Ref	Name ↑		
<input type="checkbox"/>	1214141	Contact_Company		
<input type="checkbox"/>	1214142	Contact_Individual		

## 1.2 Use the Named Range in a Document Template

We can now implement the named ranges in a document template.

When signed in to the Smarter Drafter MS Word Add-In, the named ranges can be found in the Named Ranges tab. Use the **Add** button to add it to a document.



We can set up the document template with the named range, to ensure that the correct information will be included.

In this example, the named range **Contact\_Individual** has enclosed a label and a data 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 named range **Contact\_Company** has enclosed two labels and data fields for a company name and ABN. If the button for Company is not selected in the form, these details will not be included in the document.

