



Use Option Sets and Apply Logic

Help Guide

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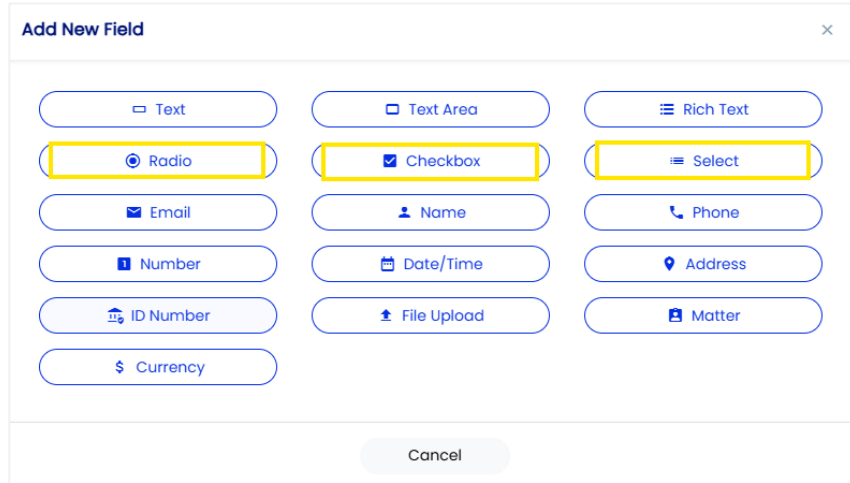
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1. Add Options to Forms

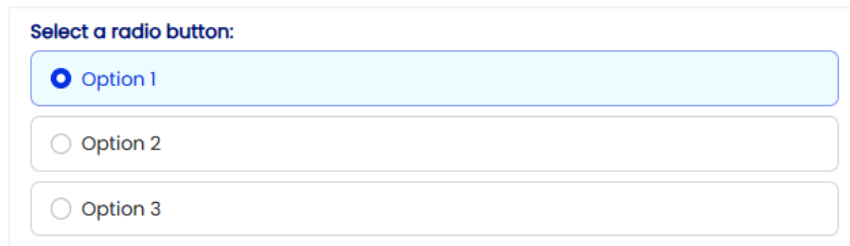
When designing a form, there will be situations where a form filler is required to make a selection from multiple options. Options sets are used to seamlessly offer multiple options.

There are several types of options sets available: radio buttons, checkboxes and selection lists.



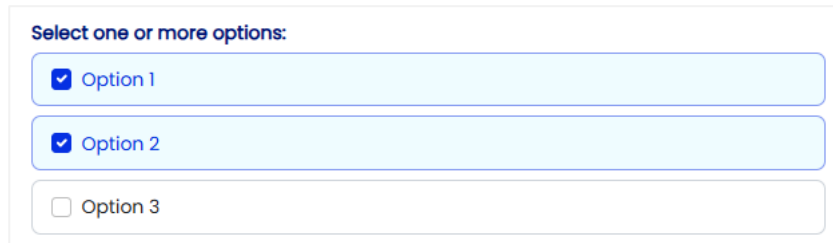
1.1 Radio Buttons

Radio Buttons enable a form filler to select one answer. To add a radio button set, click **Radio** when adding a new field. A radio button list looks like this in the form:



1.2 Checkboxes

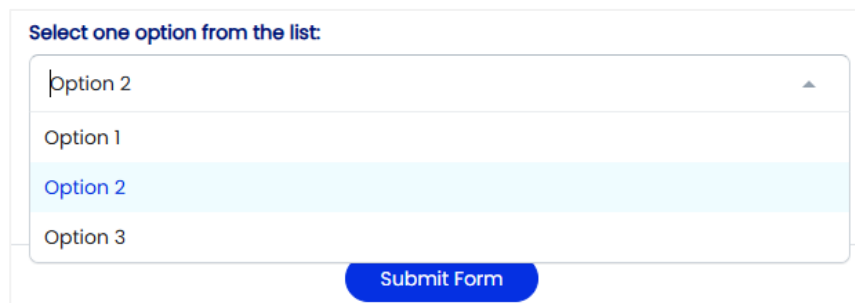
Checkboxes enable the form filler to select multiple answers. To add a checkbox list, select **Checkbox** when adding a field. The checkbox set will look like this in the form:



A screenshot of a form field titled "Select one or more options:". It contains three rows, each with a checkbox and a label: "Option 1", "Option 2", and "Option 3". The checkboxes for "Option 1" and "Option 2" are checked, while the checkbox for "Option 3" is unchecked.

1.3 Selection Lists

A selection list enables a form filler to select one answer from a drop-down list. The list format is ideal for an option set with many options, such as a list of states. To add a selection list, use the **Select** button when adding a field. The list looks like this:

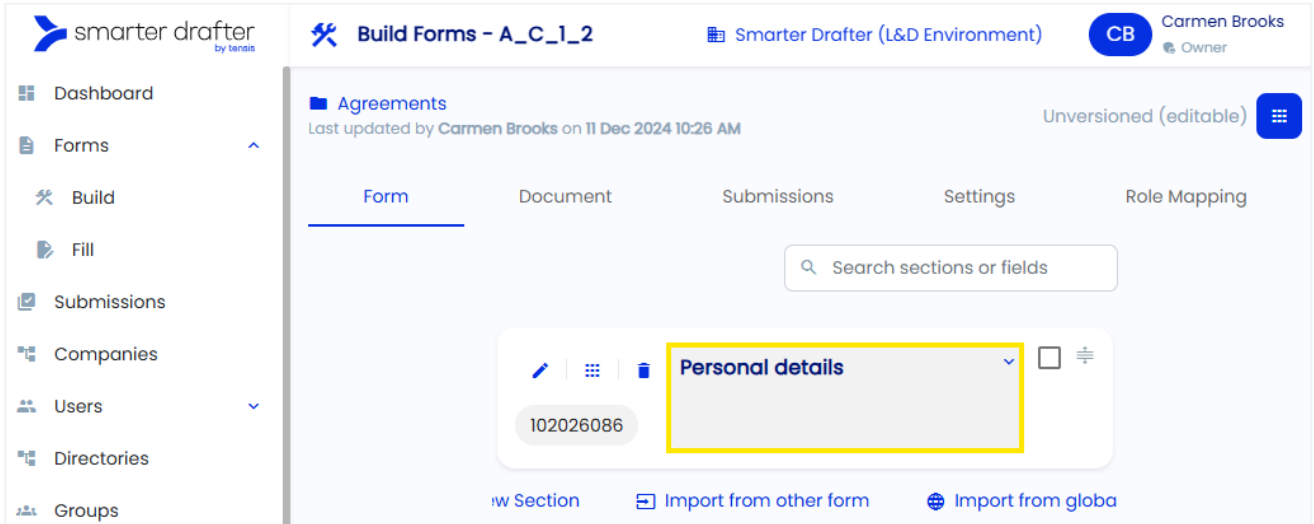


A screenshot of a form field titled "Select one option from the list:". It features a drop-down menu with a search bar at the top containing "option 2". Below the search bar, a list of options is displayed: "Option 1", "Option 2", and "Option 3". The "Option 2" entry is highlighted with a light blue background. Below the list is a blue "Submit Form" button.

2. Build Option Sets in Forms

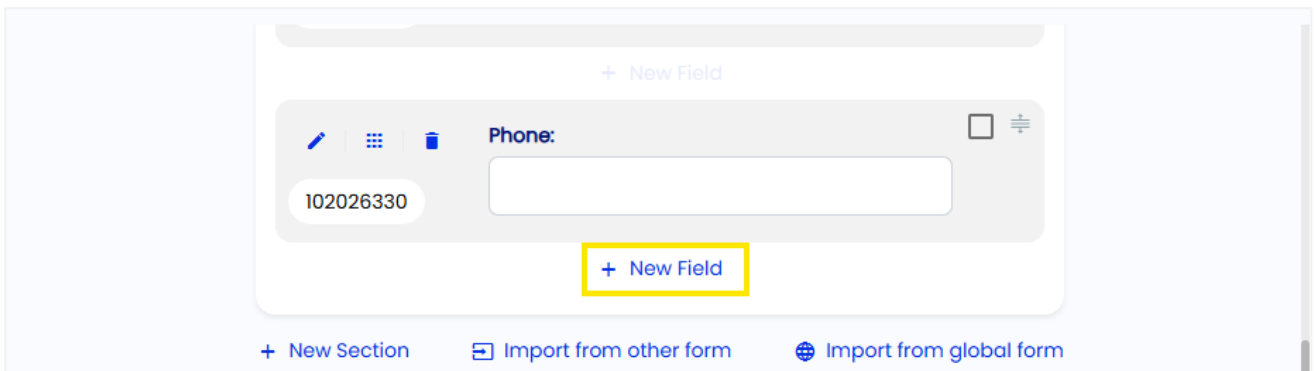
2.1 Edit the Form

Open the required form in the Form Builder. Click the section to edit the fields.



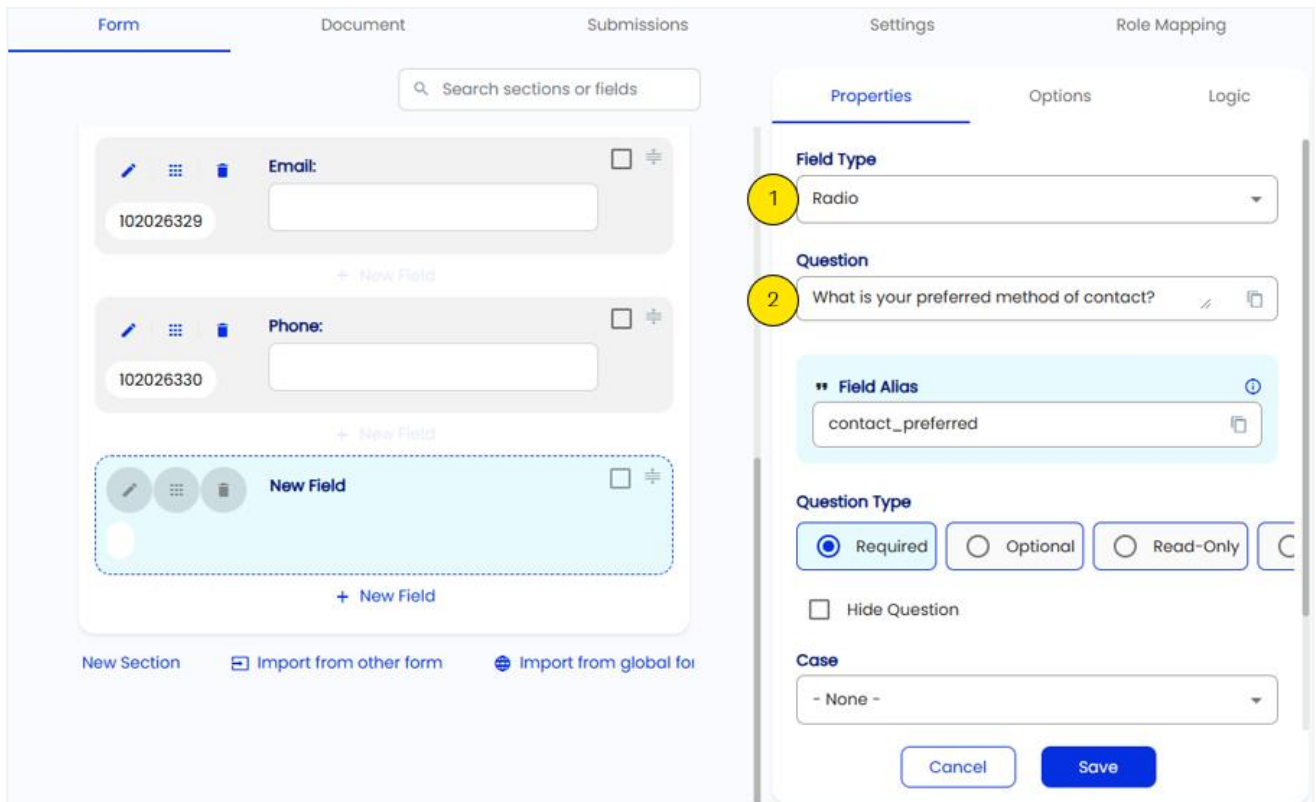
2.2 Add Logic to a Radio Button

The fields in this section appear. In this example, a **radio button** field will be created. Click **New Field**.



2.3 Use Radio Buttons

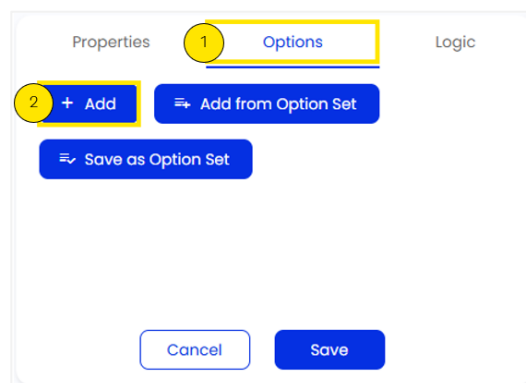
1. Radio buttons enable a single selection response. The field type is set to **Radio**.
2. In this example, the question is: What is your preferred method of contact? The question requires a response from the form filler, so the **Question Type** is set to **Required**.



The screenshot shows the Smarter Drafter interface with two main panels. The left panel, titled 'Form', displays three form fields: 'Email:' (ID: 102026329), 'Phone:' (ID: 102026330), and a 'New Field' (ID: 102026330). The right panel, titled 'Settings', shows the configuration for the 'New Field'. The 'Field Type' is set to 'Radio' (highlighted with a yellow circle '1'). The 'Question' is 'What is your preferred method of contact?' (highlighted with a yellow circle '2'). The 'Field Alias' is 'contact_preferred'. The 'Question Type' is set to 'Required' (selected with a radio button). The 'Case' is set to '- None -'. There are 'Cancel' and 'Save' buttons at the bottom of the settings panel.

We'll now add list options.

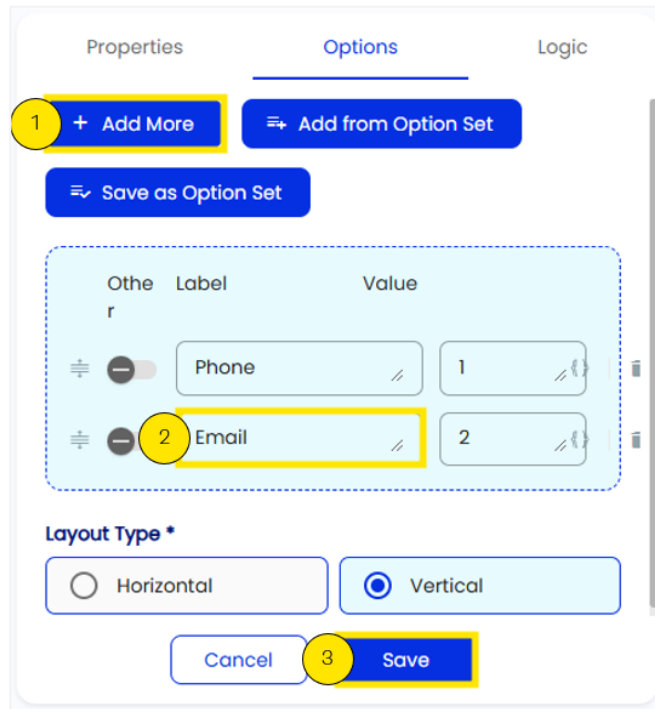
1. Click the **Options** tab on the field.
2. Click **Add** to add an option to the range.



The screenshot shows the 'Options' tab of the settings panel. The 'Options' tab is highlighted with a yellow circle '1'. The '+ Add' button is highlighted with a yellow circle '2'. There are also 'Add from Option Set' and 'Save as Option Set' buttons. At the bottom, there are 'Cancel' and 'Save' buttons.

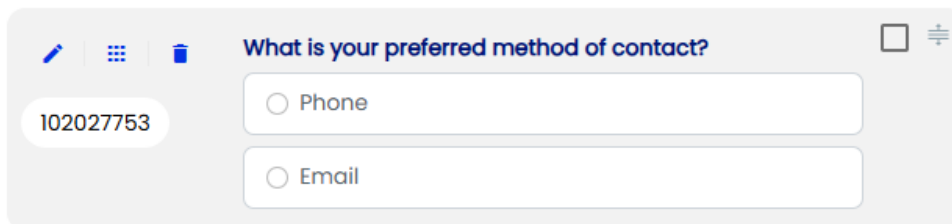
The labels editor opens.

1. Click **Add More** to add options to the range.
2. Type a unique label for each option.
3. Click Save when the list is complete.



The screenshot shows the 'Options' tab of the Smarter Drafter interface. At the top, there are three tabs: 'Properties', 'Options', and 'Logic'. The 'Options' tab is selected. Below the tabs, there are three buttons: '+ Add More' (highlighted with a yellow circle and the number 1), 'Add from Option Set', and 'Save as Option Set'. Below these buttons is a table with three columns: 'Other', 'Label', and 'Value'. The table contains two rows: 'Phone' with value '1' and 'Email' with value '2'. The 'Email' row is highlighted with a yellow circle and the number 2. Below the table, there is a 'Layout Type' section with two radio buttons: 'Horizontal' and 'Vertical'. The 'Vertical' radio button is selected. At the bottom, there are two buttons: 'Cancel' and 'Save' (highlighted with a yellow circle and the number 3).

This is what the completed field looks like:



The screenshot shows a completed form field titled 'What is your preferred method of contact?'. The field contains two radio button options: 'Phone' and 'Email'. The field is set to 'Vertical' layout. A phone number '102027753' is visible in the top left corner of the form.

We will now move on to explore how logic can work with a single response multiple choice question, like the one above, to improve flow in a form and present relevant additional questions.

1. Using Logic to Improve Flow in Forms

Logic is what makes a form appear smart. Rather than asking users every question in the form, we can selectively show or hide fields (or sections) by using logic (rules). By default, when a field has no logic applied, it will always be shown to the user. As soon as logic is applied, a field can be hidden or shown, depending on the rule. Logic can be applied to sections and most field types but is often used with option sets.

1.1 Using Logic with a Radio Button List

Depending on the response a form filler gives to a radio button field, the logic applied to the field takes the form filler through different questions.

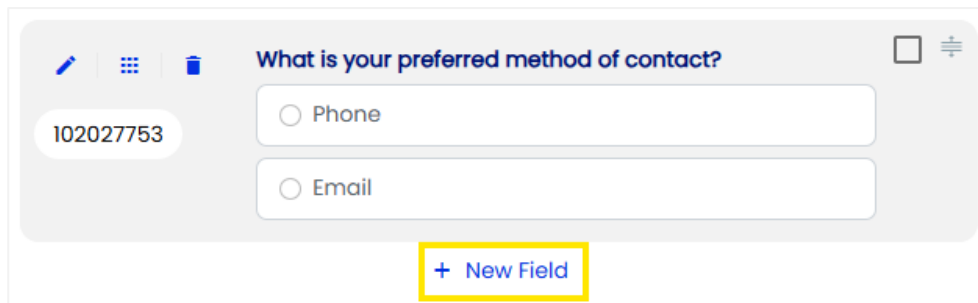
For example: The form may ask if the form filler is an individual or a company. If the answer is "company", the next question offered would be to ask for the company ABN, or other company identifier. If the answer is "individual", the form may present questions asking for their full name and date of birth. This branch in the line of questions is created by applying logic to the form fields.

By applying logic, we can reduce the questions that are presented to the form filler, so they are only offered the questions that are relevant.

1.2 Logic with Radio Buttons Example

In this example, a new question will be added to find out how the form filler would like to be contacted. After this question is answered, the form filler will be asked to enter their phone number or their email, depending on their preference.

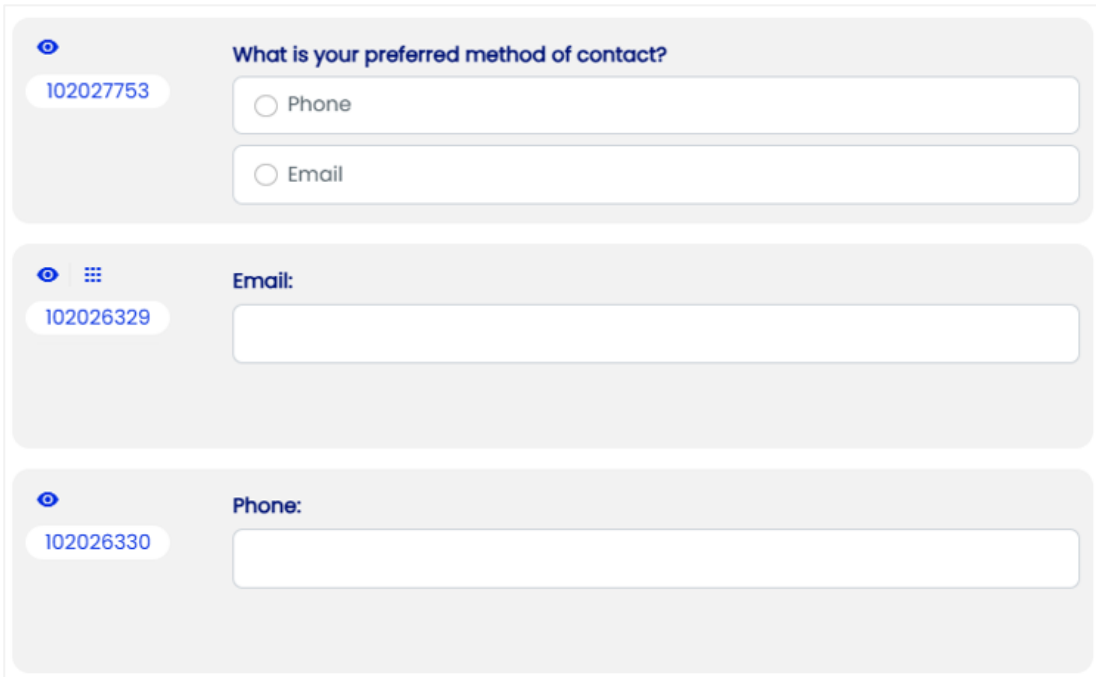
The radio button list was be constructed as follows:



The screenshot shows a form builder interface. At the top, there are icons for edit, list, and delete, followed by the question text "What is your preferred method of contact?". Below the question, there are two radio button options: "Phone" and "Email". A yellow box highlights a "+ New Field" button located below the "Email" option.

With this question in the form, we can add the Phone Number and Email fields. Refer to Module 1 for guidance on how to do this, if you haven't already.

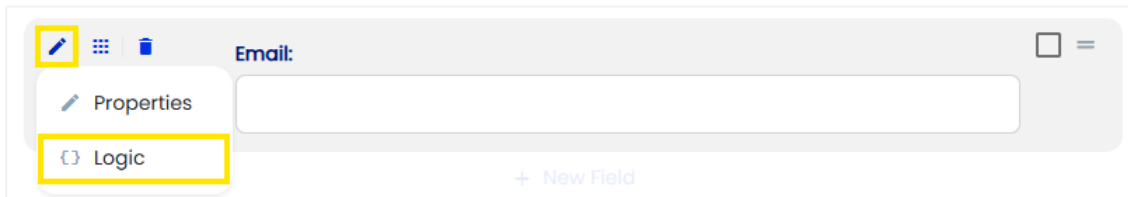
The three fields will look like this, in the form builder:



The image shows three form fields in a form builder interface. The first field is titled "What is your preferred method of contact?" and has a unique ID of 102027753. It contains two radio button options: "Phone" and "Email". The second field is titled "Email:" and has a unique ID of 102026329. The third field is titled "Phone:" and has a unique ID of 102026330. Each field has a pencil icon for editing and a trash icon for deletion.

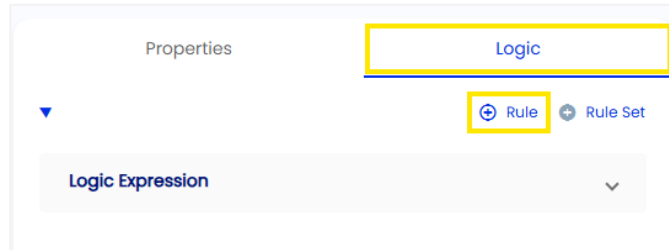
We can now add logic to the Email field:

1. Click the pencil shaped edit button.
2. Click Logic.



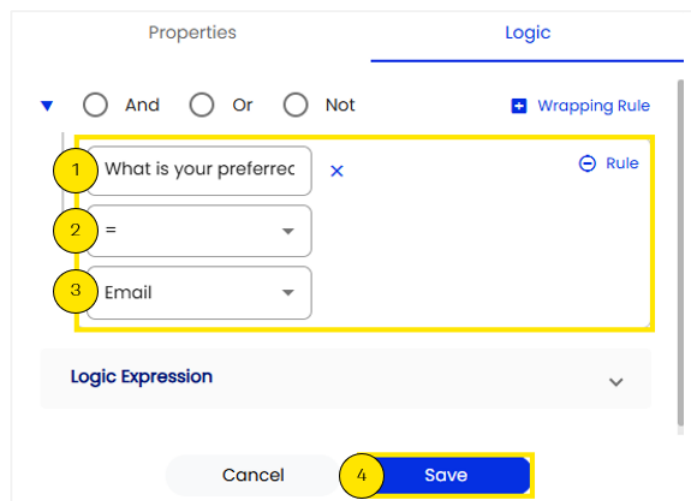
The image shows the "Email:" field with the edit menu open. The menu has two options: "Properties" and "Logic". The "Logic" option is highlighted with a yellow box. The field has a unique ID of 102026329. There is also a "+ New Field" button at the bottom right of the field.

1. The **Logic** editor opens (it's the tab next to the **Properties** editor).
2. Click the **Add Rule** button.



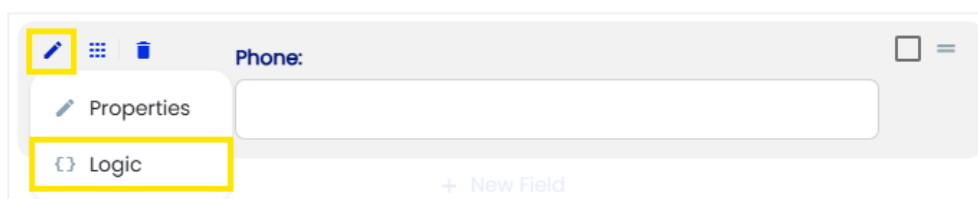
Use the drop-down lists to apply logic:

1. Select the **question** this field depends on: "What is your preferred method of contact?".
2. Select the **operator**. In this example, it's "equal to", or the equal sign.
3. Select **Email**.
4. Click **Save**.

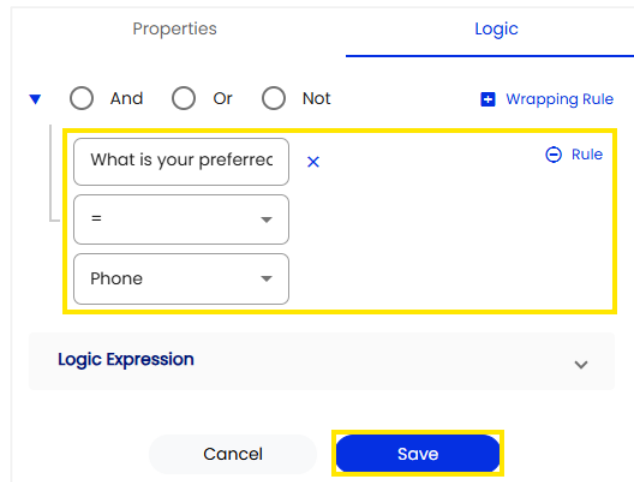


We will now repeat the process to apply logic to the **Phone** field.

1. Click the **edit** button.
2. Click **Logic**.

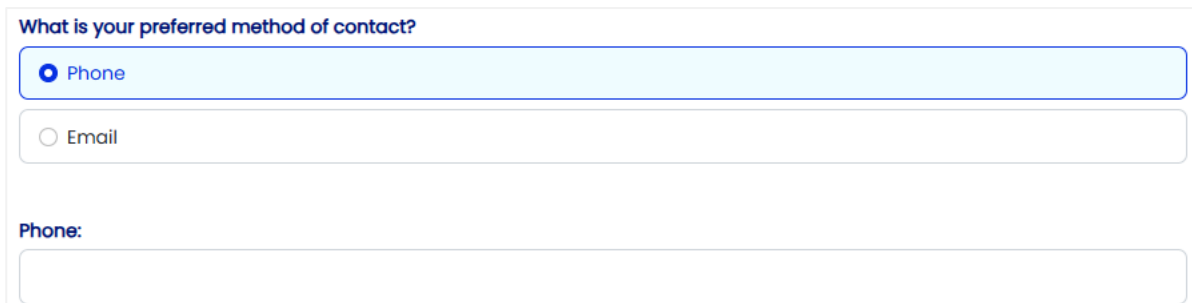


Apply Logic as follows, using the same principles as used for the email field, and click **Save**.

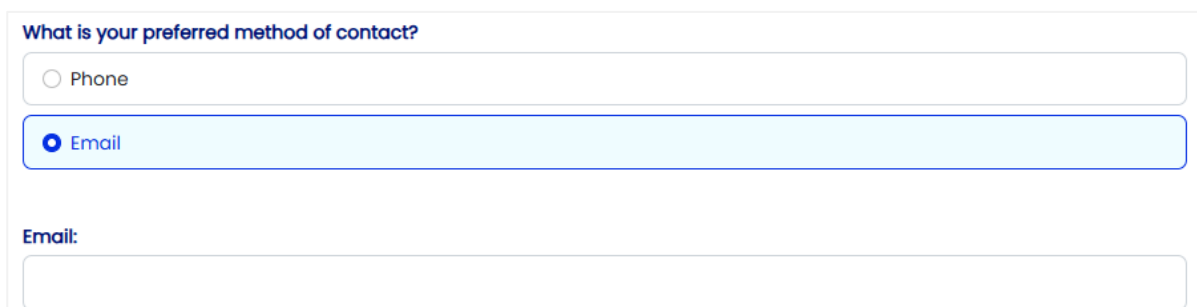


1.3 The Finished Form Fields

With logic, the form appears smart. A form filler who prefers to be contacted by phone will be asked to enter their phone number.

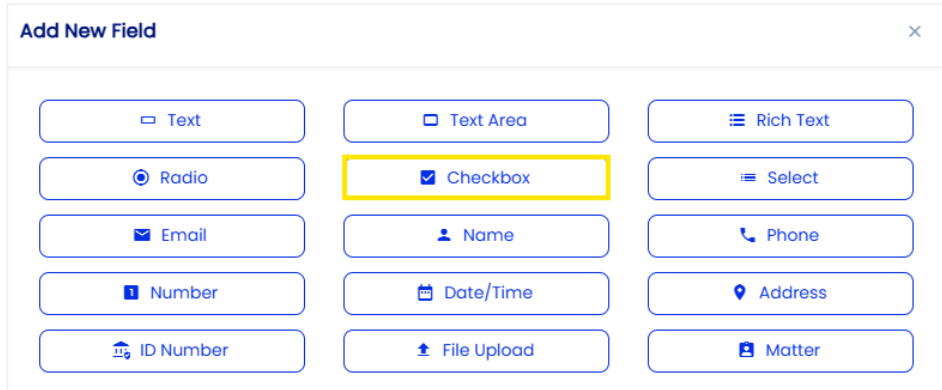


If they select email, they will not be asked for their email address.



1.4 Use Logic with Checkboxes

Like radio buttons, checkboxes are fields that provide a list of options, though checkboxes allow for multiple selections. To create checkboxes, select the **Checkbox** field type:



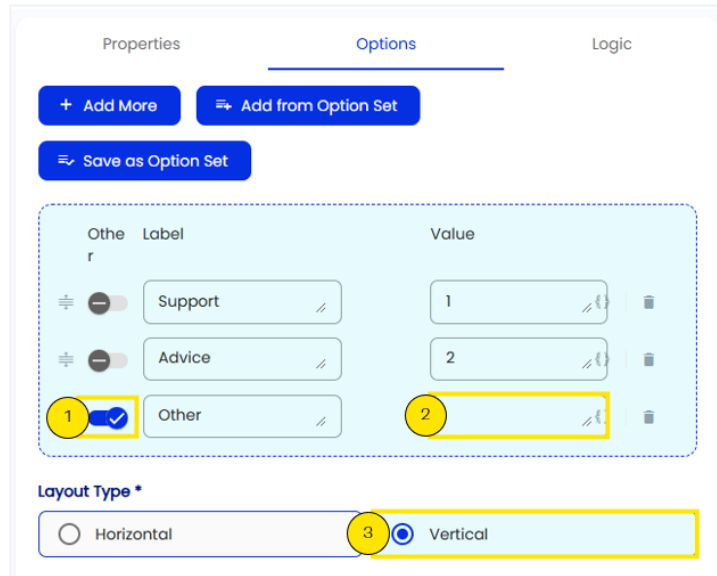
The screenshot shows a dialog box titled "Add New Field" with a close button (X) in the top right corner. The dialog contains a grid of 15 field type buttons arranged in three columns and five rows. The buttons are: Text, Text Area, Rich Text, Radio, **Checkbox** (highlighted with a yellow border), Select, Email, Name, Phone, Number, Date/Time, Address, ID Number, File Upload, and Matter.

Editing the options in a list of checkboxes is the same process as used for radio buttons, above.

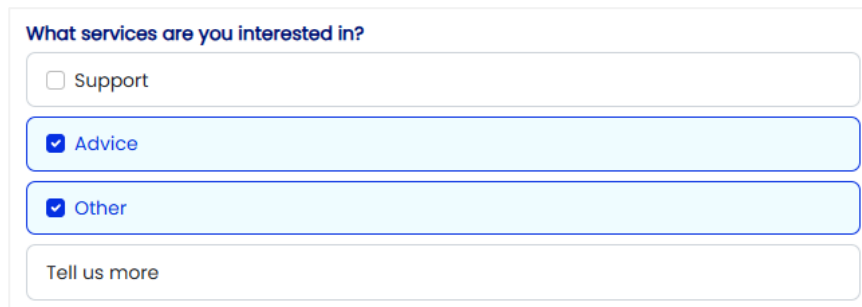
1.5 Gathering Additional Information

In all lists of options, there is a slider to assign an **Other** option. This gives the form filler the opportunity to write in an answer if the answer that they need to provide is not available in the list. Toggle the slider on to set a list option as **Other**. When the form filler selects this option, it will open a text field for them to add their answer.

1. To set the **Other** option, toggle the slider as shown.
2. The **Value** is the text that will appear in the **Other** text field when it appears. It may be something like, "Tell us more", which prompts the form filler to give further information.
3. **Vertical** and **Horizontal** options relate to how the list options are displayed. Vertical layout will create a vertical list.

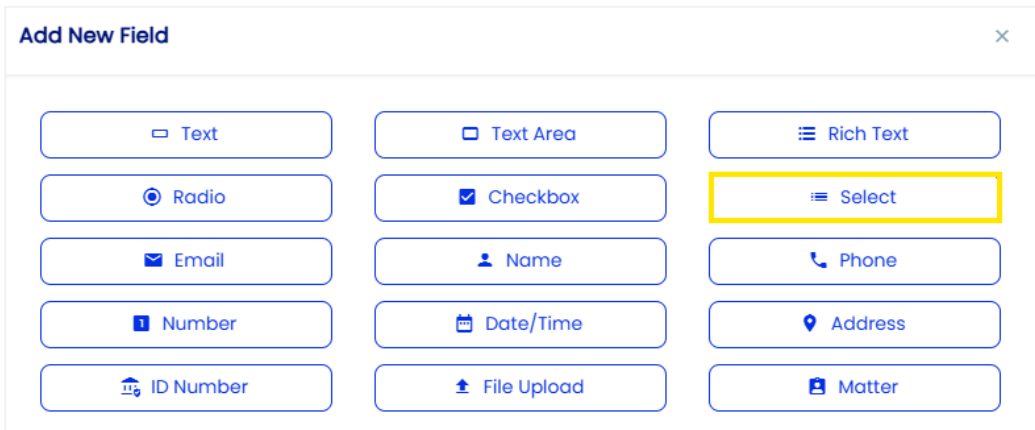


This is the finished product of the checkbox field created above. Multiple options can be selected and since **Other** is selected, a field has appeared to capture more information.

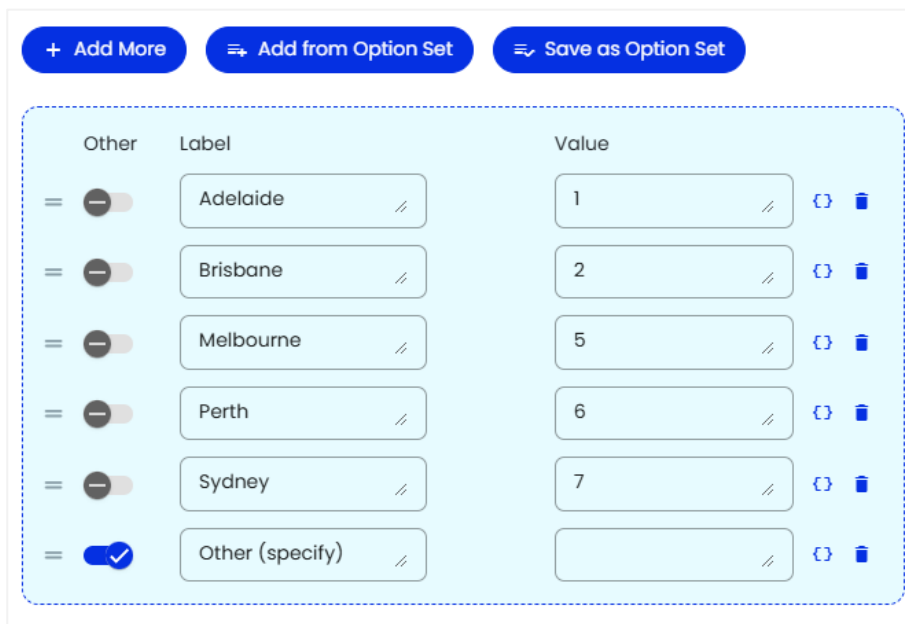


1.6 Use Logic with Selection List

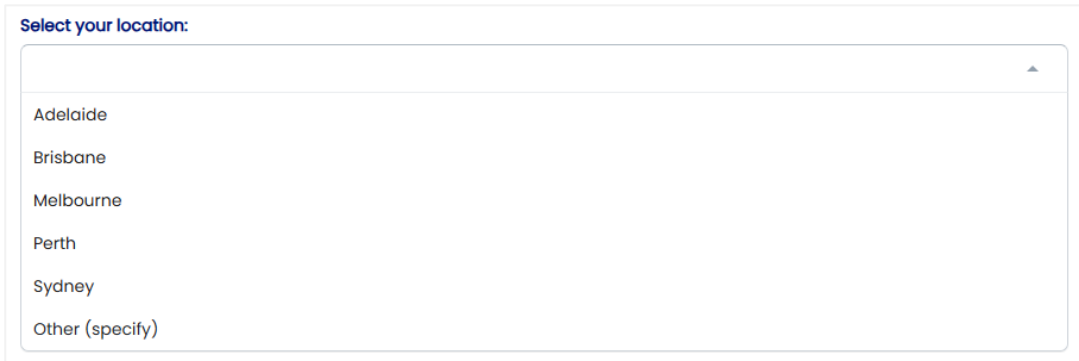
A selection list is a list of options that appear in a drop-down list. Only one option can be selected in this type of field. A select field is preferable to a radio button field where you wish to make a large number of options available for selection, to avoid all the options showing in the form at once. To add a select field, click **Select** in the field type.



For example, a longer list of locations may be presented as follows:



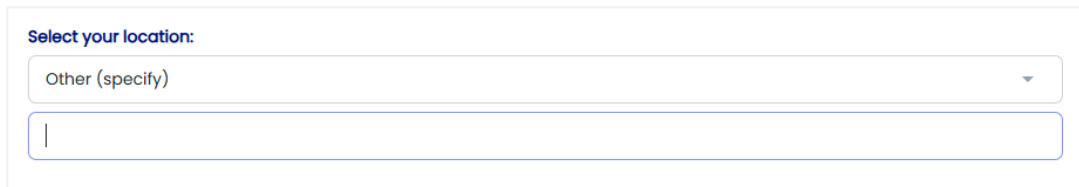
The finished selection field would look like this:



Select your location:

- Adelaide
- Brisbane
- Melbourne
- Perth
- Sydney
- Other (specify)

The text field to request further information would be revealed if the 'other' enabled option was selected.

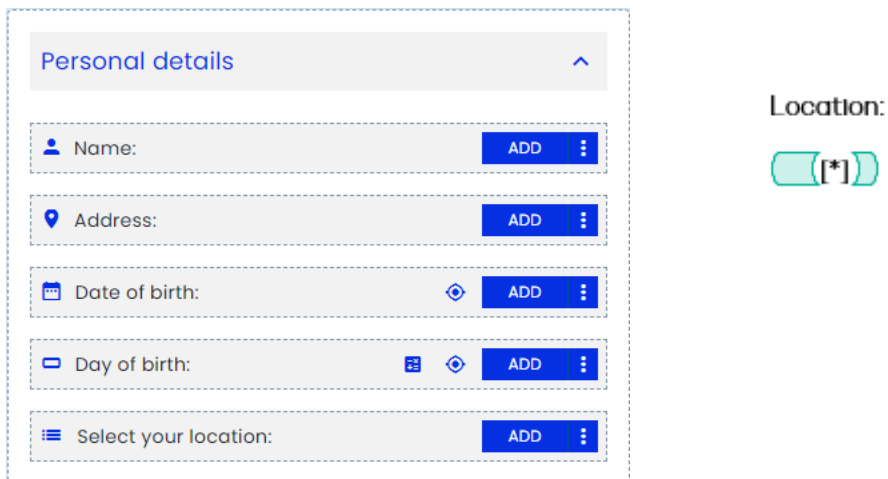


Select your location:

Other (specify)

2. Setting up the Word Template

In your Word document, you can output the option selected as with any other type of field. Simply use the Add button of the to drop the data field into the document template.



Personal details

Name: ADD

Address: ADD

Date of birth: ADD

Day of birth: ADD

Select your location: ADD

Location: ([*])

Either the option selected will be entered, or if Other is selected, the typed response will be entered into the final document.