



Use Section Blocks

Help Guide

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1. Section Blocks

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

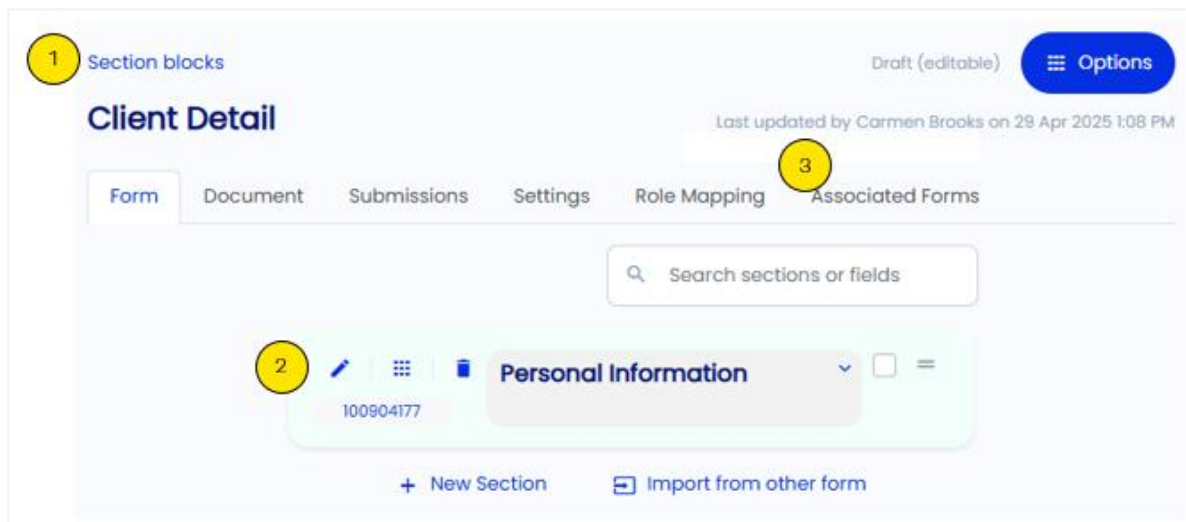
For instance, when creating a suite of court forms, every automation will require details on legal representation. Rather than building the same set of questions from scratch each time, you may create a section block and reuse it in any number of forms. Section blocks also preserve any guidance added to the form.

Section blocks are built in exactly the same manner as sections in a standard form. Any updates made to a section block will be reflected in all the forms they are inserted into, allowing you to make global updates in a single location.

1.1 Section Block Features

Section blocks are constructed in a similar way to forms.

1. They are colour-coded green with the **Section blocks** label to distinguish them from standard forms.
2. Below is the **Section Block Builder** – note the mint green background.
3. The **Associated Forms** tab will display all the forms the section block is used in.



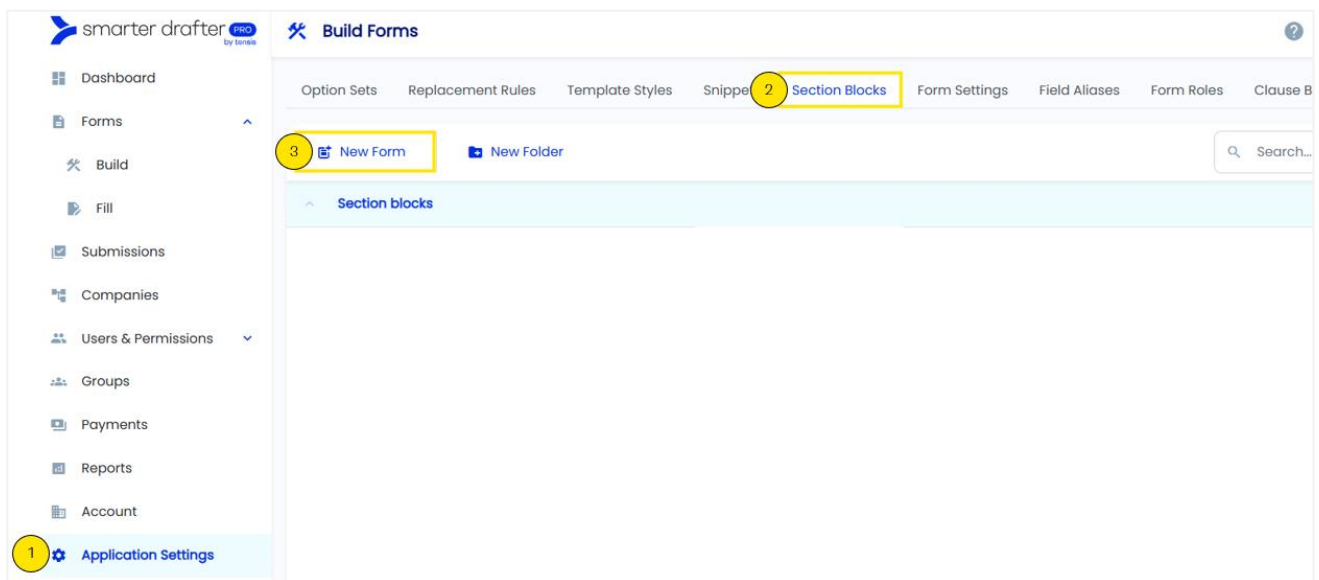
2. Creating a New Section Block

Creating a section block is a similar process to creating a form; however, section blocks are organised under **Application Settings**.

To access existing and/or create a new section block, navigate to the section block builder.

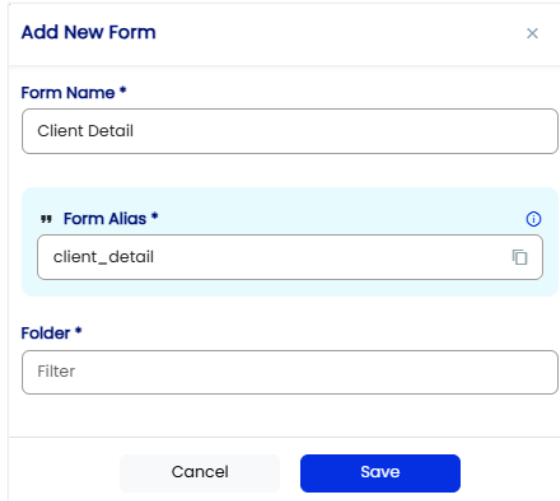
1. Click **Application Settings**.
2. Click **Section Blocks**.
3. Click **New Form** to create a new **section block**.

Section blocks are organised in folders, like forms. The saved section blocks will be found in the folders.



Note: The section block builder has similar features to the form builder. Refer to the [Create a Simple Form Help Guide](#).

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. Click **Save**.



Add New Form [Close]

Form Name *
Client Detail

Form Alias *
client_detail

Folder *
Filter

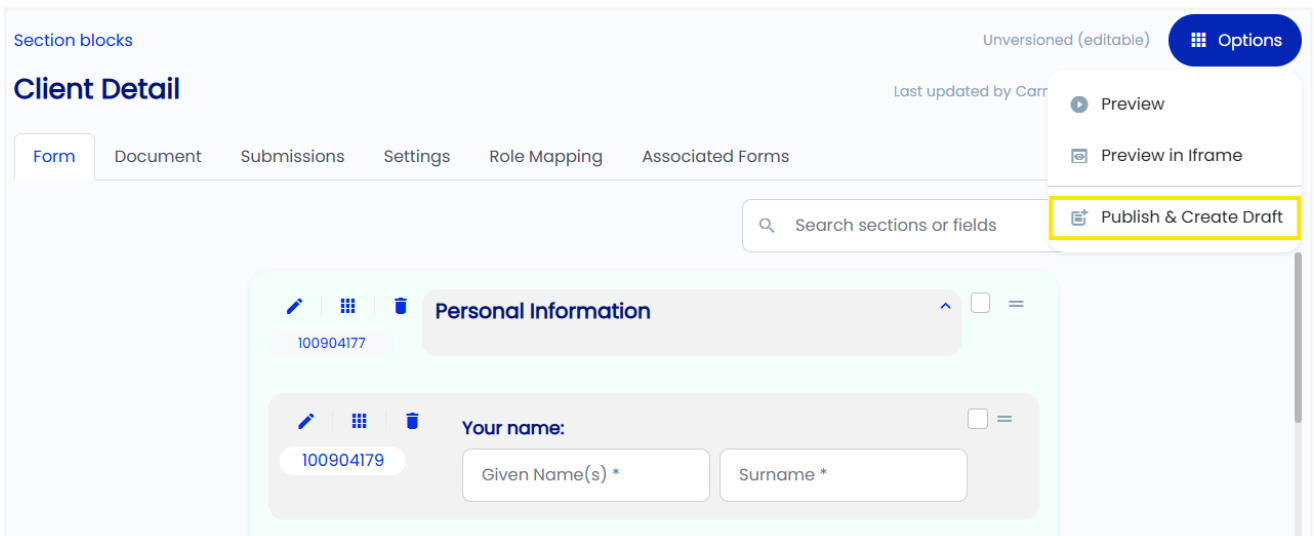
Cancel Save

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

2.1 Map Fields to Contacts and Roles

A section block 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 form. See the [Contact and User Mapping Help Guide](#) for instructions.

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



Section blocks Unversioned (editable) Options

Client Detail Last updated by Carr

Form Document Submissions Settings Role Mapping Associated Forms

Search sections or fields

Preview
Preview in Iframe
Publish & Create Draft

Personal Information 100904177

Your name: 100904179

Given Name(s) * Surname *

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

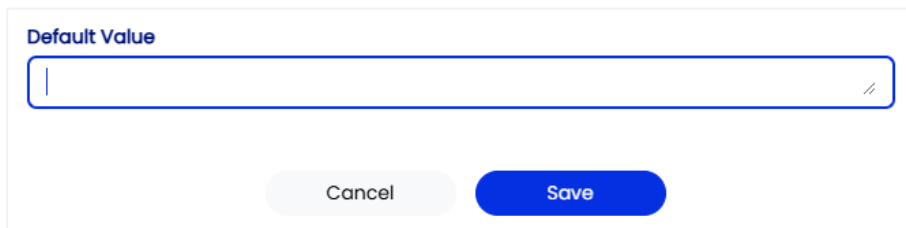
2.2 Repeating Content and Conditional Rules

Section blocks can include repeating content, like a form. Simply create a new section and tick the box to make it a repeating section. Create a repeat Conditional Rule so that it's ready to use in the template. Conditional Rules will automatically transfer across to forms that use the section block.

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 transfer fee field can be prefilled in the section block, which will populate across every form the section block 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.

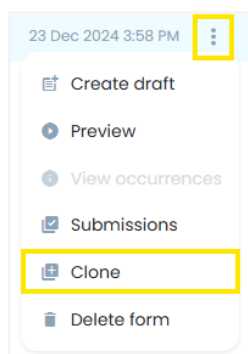
To implement this feature, use the Default Value field when adding a new field.



A dialog box titled "Default Value" with a text input field and two buttons: "Cancel" and "Save".

2.4 Cloning a Section Block

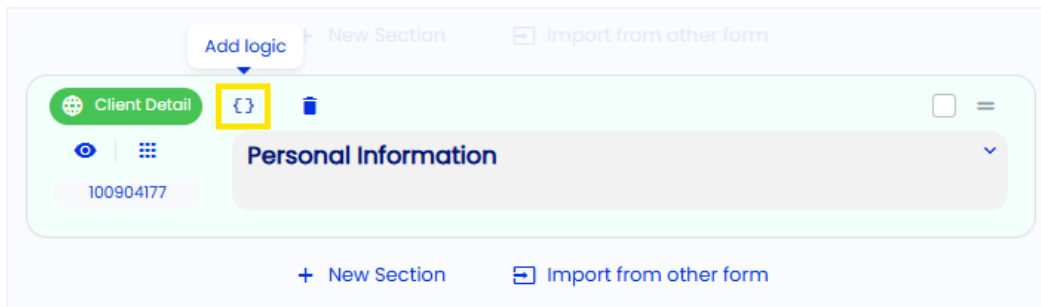
Section blocks can be cloned, like forms. In the section blocks list in **Application Settings**, click the **ellipsis** and select **Clone**.



2.5 Logic

Logic can be applied to a section block, so the section block is included in the form *only if required*.

Click the **Add Logic** button in the banner of the section block. Refer to the [Apply Logic Help Guide](#) for more information.



2.6 Reusable Questions

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

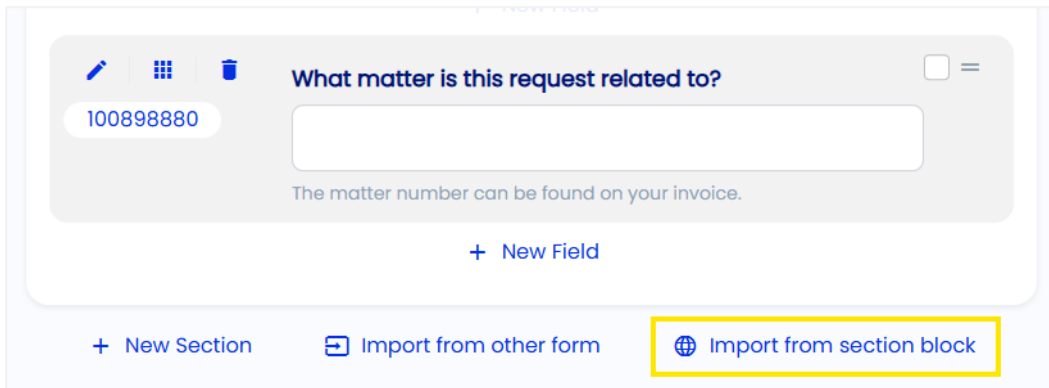
2.7 Section Blocks and Word Templates

A section block can be linked to a Word document – this is called a content block. Doing this gives you the ability to insert text and images into your template from a 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 [Content Blocks Help Guide](#).

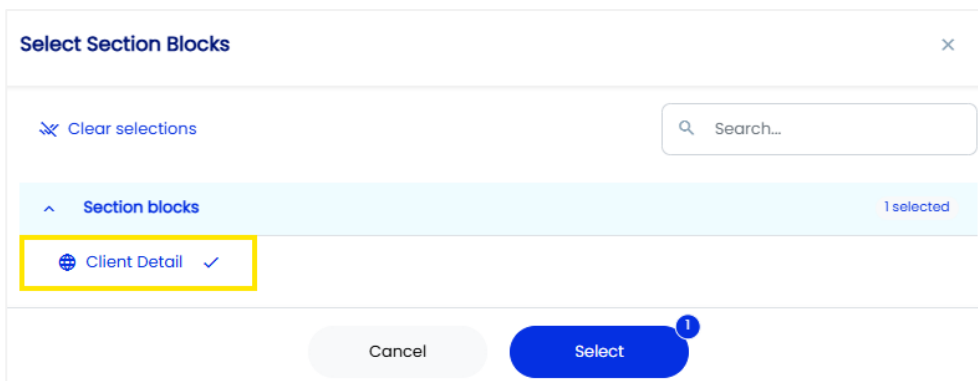
2.8 Import a Section Block into a Form

A section block can be imported into a Form. Create a new Form, following the typical process.

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

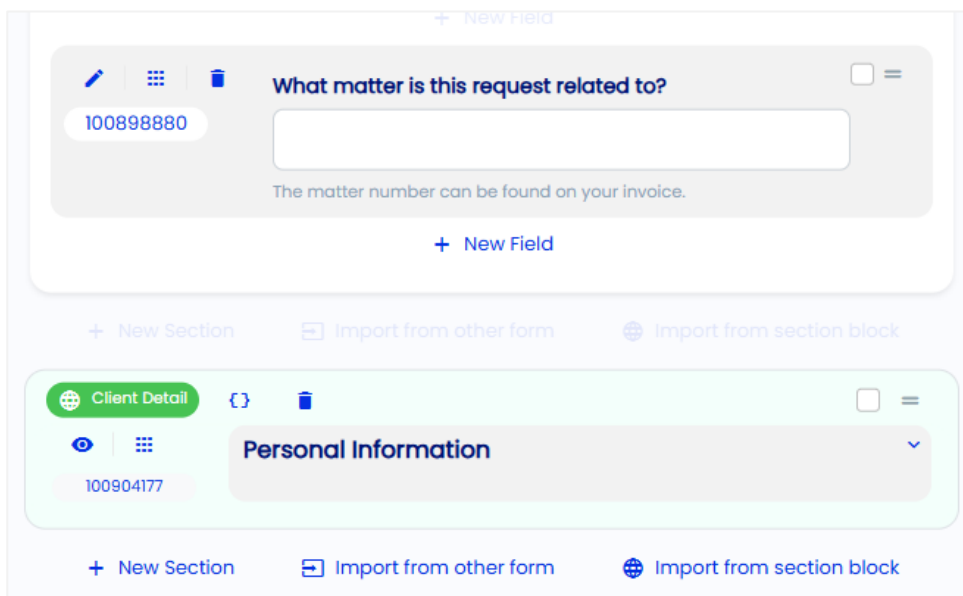


2. Select the **section block** from the list and click **Select**.



The section block is inserted into the form as a section. It's highlighted with a mint green background to differentiate it from a standard section and alert the form builder that this section cannot be edited from within the standard form.

Any number of section blocks can be included in a standard form by using the **Import from section block** button.



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