

PRODUCT BRIEF

Global Forms and Dynamic Snippets

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Waging War on Rekeying

A key element of Smarter Drafter's war on rekeying is its integration with Practice Management solutions. This integration eliminates the need for end-users to manually re-enter data by directly synchronising information into document automations. By removing repetitive data entry, it delivers significant benefits to the end user, saving time and reducing errors.

While the benefits have been significant for the end user, the experience of team members who build the automations has been overlooked - until now.

Accelerate Automation and Ensure Consistency

Smarter Drafter's latest release introduces **Global Forms** and **Dynamic Snippets**.

When automating a suite of documents, many elements, such as questions in a Q+A form and repeated content in final documents, recur across the process. For example, when producing a suite of court forms, certain information often needs to be repeated across multiple documents, such as:

- Court matter details
- Party details
- Filing party details

When developing automation for each of these documents, there are two core components that are required: the Q+A form the end user fills out and the wording

that appears in the final document. **Global Forms** streamline the former, while **Dynamic Snippets** simplify the latter.

Both features, available with all Smarter Drafter Enterprise subscriptions, not only accelerate the automation build process but also ensure consistency across automations by offering reusable objects available for the entire automation team to use.

Global Forms

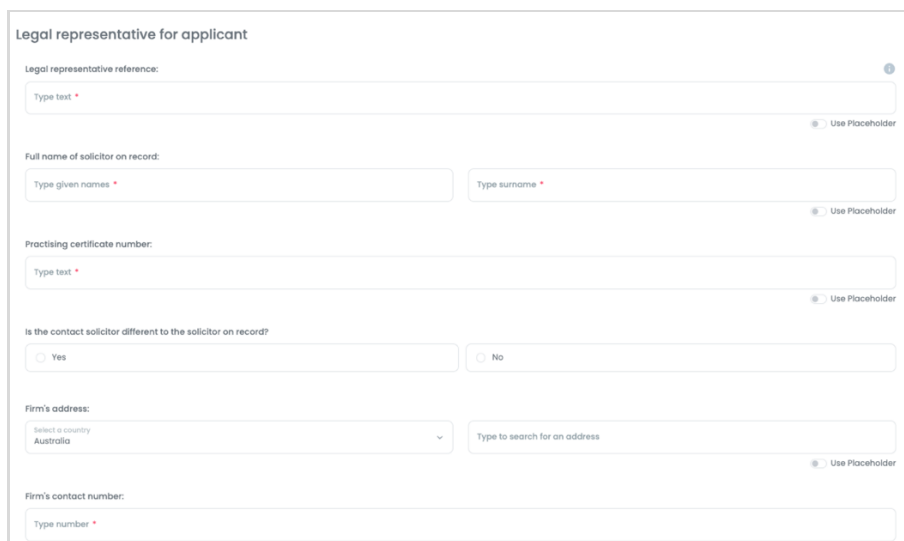
A Global Form is a reusable set of questions that can be applied across an unlimited number of automations. With this feature, automation builders only need to create a question set once and can then reuse it in all subsequent automations.

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 as an object and reused repeatedly. Global Forms also preserves any guidance added to the question set or individual questions.

Additionally, Global Forms can be shared across an automation team, ensuring consistency in the drafting process for users and standardisation across an organisation's automated documents.

Change once, update everywhere

If changes are needed in the Global Form due to updates in wording or legislation, they can now be managed centrally. A single update to the Global Form will instantly reflect across all automations where it is used, saving time and eliminating the risk of inconsistency across documents.



The screenshot shows a form titled "Legal representative for applicant". It contains the following fields and options:

- Legal representative reference:** A text input field with a "Use Placeholder" button.
- Full name of solicitor on record:** Two text input fields: "Type given names" and "Type surname", with a "Use Placeholder" button.
- Practising certificate number:** A text input field with a "Use Placeholder" button.
- Is the contact solicitor different to the solicitor on record?:** Two radio button options: "Yes" and "No".
- Firm's address:** A dropdown menu for "Select a country" (currently showing "Australia") and a text input field for "Type to search for an address", with a "Use Placeholder" button.
- Firm's contact number:** A text input field with a "Use Placeholder" button.

Example of Legal Representation in a Q+A Form

Dynamic Snippets

A Dynamic Snippet is a reusable block of text associated with a Global Form. Like Global Forms, Dynamic Snippets are coded once and can be reused across multiple automations.

In the case of legal representation in a Court Form, for example, a Dynamic Snippet would include the standard text and layout to be inserted into the final client document.

Dynamic Snippets ensure consistency across document layouts, facilitating faster review and approval processes. They also help maintain a standard brand quality for all documents. Dynamic Snippets can also be shared across a team, offering a pool of ready-to-use wording objects for quickly developing new automations.

Change once, update everywhere

Centralised management is also available for Dynamic Snippets. Any change to a Dynamic Snippet is instantly replicated across all documents where it has been used, ensuring uniformity.

FILING DETAILS	
Filed for	John Doe, applicant
Legal representative	Christopher Black - Friendly Lawyers
Legal representative reference	1234
Contact name and telephone	Christopher Black - 02 99789087
Contact email	frontdesk@blacklegal.com

Example of Legal Representation in a client document

Available Now

Global Forms and Dynamic Snippets are both exclusive to Smarter Drafter Pro subscriptions and are available now.