



# Apply Logic in Forms

Module 10 – Logic

Version 1.0

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## 1. Logic

### 1.1 What is Logic?

Logic is what changes the simple idea of a questionnaire into a smart form. As you build the form, you can use logic to steer the form in different directions. This allows you to cater for variations so that one form can deliver multiple outcomes.

Rather than asking a form filler every possible question, forcing them to ignore what they don't need or confusing them with irrelevant options, logic can be used to control the behaviour of the form. It allows you to create an extensive form and then set conditions to handle the various alternatives. While the form will include questions for every possibility, when the form filler generates the document and starts answering the questions, the logic will interpret their answers and determine what to ask next.

By applying logic, you can instruct Smarter Drafter on how to determine:

- Whether a section is to be shown
- Whether a field is to be shown
- What options to include in a list
- What document/s to generate with the form

### 1.2 Where can I use Logic?

Logic can be applied to:

- Sections
- Section blocks
- Fields
- Option lists
- Attaching templates

By default, all of the above will be visible/active when created. If logic is applied, the logic will set the conditions and control the direction of the form.

## 1.3 Logic operators

When applying logic, there are various operators available to set the conditions to be applied, which are:

<b>=</b>	<b>Equal to</b> Result must be an exact match to the conditions
<b>!=</b>	<b>Not equal to</b> Result must not match the conditions
<b>&gt;</b>	<b>Greater than</b> Result must exceed the conditions
<b>&gt;=</b>	<b>Greater than or equal to</b> Result must equal or be greater than the conditions
<b>&lt;</b>	<b>Less than</b> Result must be less than the conditions
<b>&lt;=</b>	<b>Less than or equal to</b> Result must equal or be less than the conditions
<b>Is answered</b>	<b>Is answered</b> An answer must be provided
<b>Is not answered</b>	<b>Is not answered</b> An answer must not be provided

## 1.4 Logic Structure

Logic can be built using:

- A single condition
- Multiple conditions
- Nested conditions
- Wrapped condition sets

Each of these options will be covered in this guide.

## 1.5 Logic Expressions

The expression of logic is: **IF** <set condition> **THEN** <do this>.

Experienced automators will be familiar with the expression IF – THEN – ELSE. Smarter Drafter's logic tool is a basic IF – THEN statement, but the calculation tool can handle IF – THEN – ELSE statements (see the **Calculations** guides).

## 1.6 Logic Condition Outcomes

Logic conditions are designed to return a result of **TRUE** or **FALSE**.

Where the condition/s are met, the result is **TRUE** and so the expression can proceed to perform the conditioned outcome.

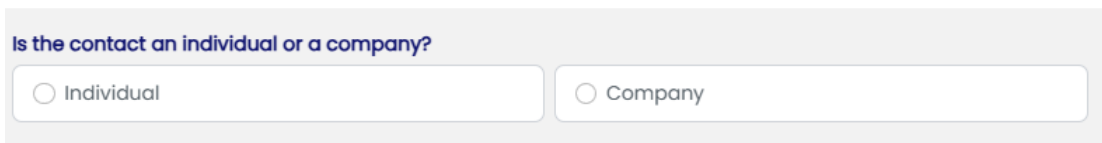
Where the condition/s are not met, the result is **FALSE** so therefore the expression can't proceed and there is no outcome.

## 2. Logic Conditions

### 2.1 Logic with a Single Condition

Logic can be based on a single condition, meaning a rule is created setting one criteria to be met.

In this example, a question will be asked whether the contact is an individual or a company.



Is the contact an individual or a company?

☐ Individual ☐ Company

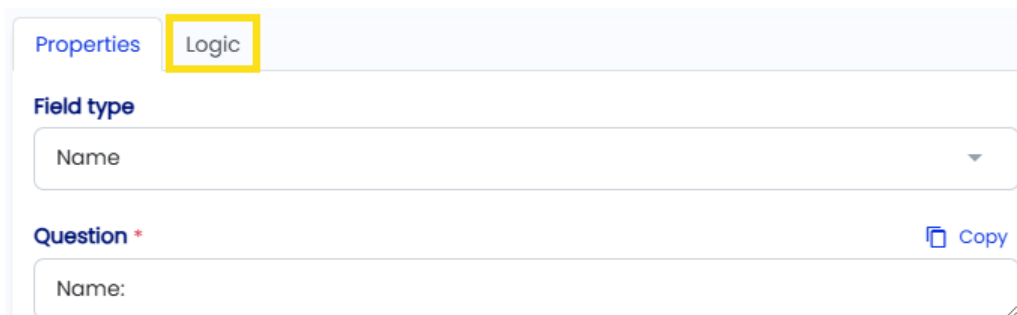
Logic will then be used to determine what to do next depending on the answer selected:

>> If an individual, ask for the full name – use a name field

>> If a company, ask for the company name – use a text field

Logic is required against each field to control when to reveal / hide it.

In the field properties, click on the Logic tab to apply logic:



Properties **Logic**

Field type

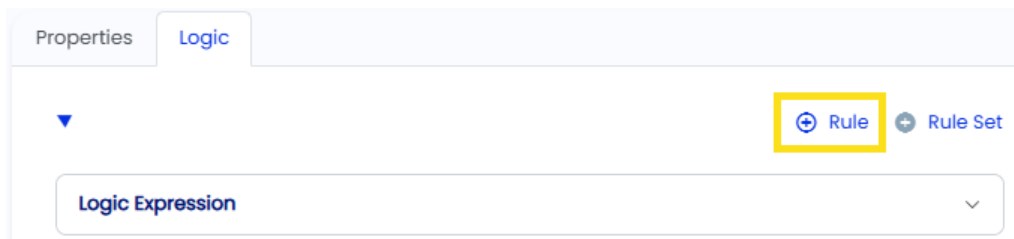
Name

Question \*

Name:

Copy

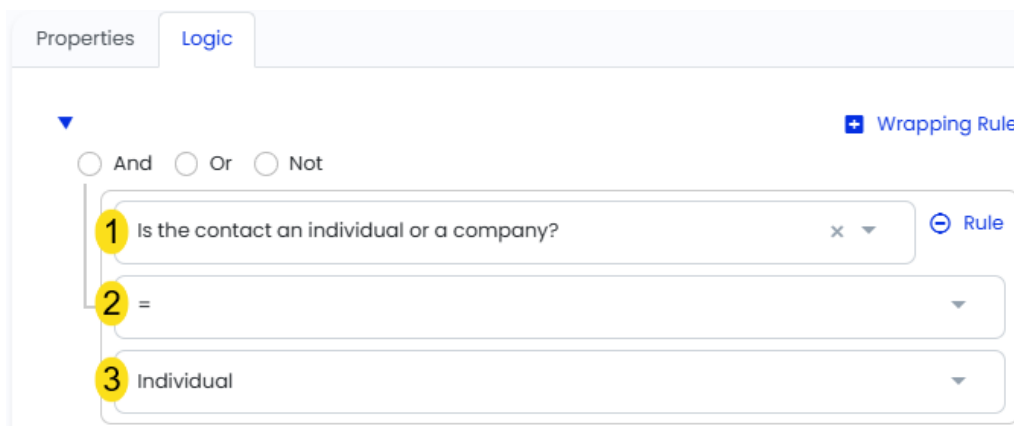
In the Logic tab, click **+Rule** to add a rule:



The screenshot shows the 'Logic' tab selected. A yellow box highlights the '+ Rule' button, with a '+ Rule Set' button next to it. Below these buttons is a 'Logic Expression' input field.

On the full name field, set the logic so that it's only revealed where the answer is individual.

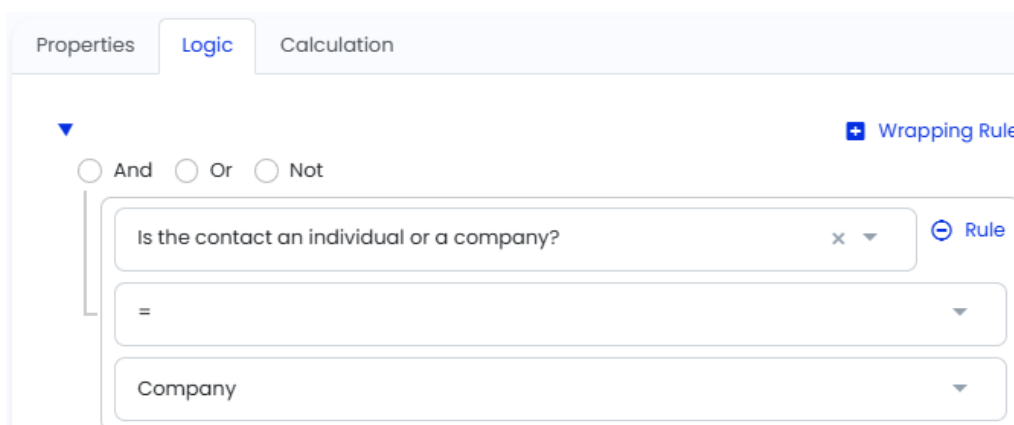
1. Click on the drop-down and find the field that is the deciding factor.
2. Set the operator.
3. Set the required response.



The screenshot shows the 'Logic' tab with a rule being configured. The rule is set to 'And'. The first condition is 'Is the contact an individual or a company?' (labeled 1). The operator is '=' (labeled 2). The response is 'Individual' (labeled 3). A '+ Wrapping Rule' button is visible in the top right.

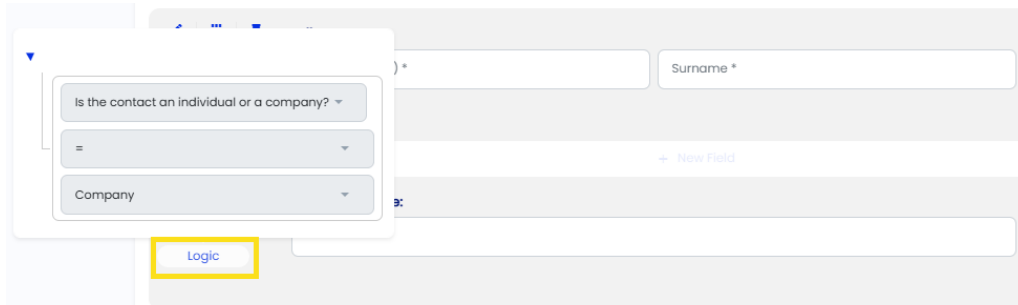
**Note:** When searching for the field to use in your logic expression, it can be time consuming to scroll through the fields in a lengthy list. Place your cursor in the field drop-down and type a keyword to navigate quickly.

The same is done on the company name field, where the alternate answer is selected so that this question is only revealed where the answer is company:



The screenshot shows the 'Logic' tab with a rule being configured. The rule is set to 'And'. The first condition is 'Is the contact an individual or a company?' (labeled 1). The operator is '=' (labeled 2). The response is 'Company' (labeled 3). A '+ Wrapping Rule' button is visible in the top right.

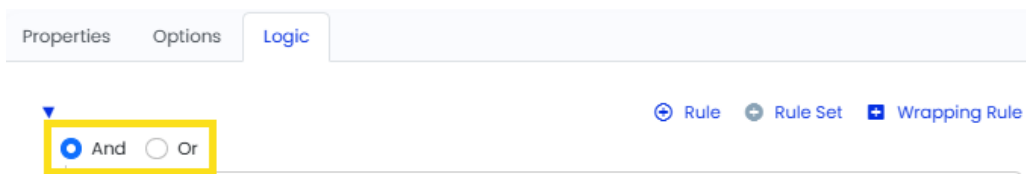
A logic pill will appear on fields where logic has been applied. Click on the pill to reveal a summary of the logic that was used.



## 2.2 Logic with Multiple Conditions – Rule Sets

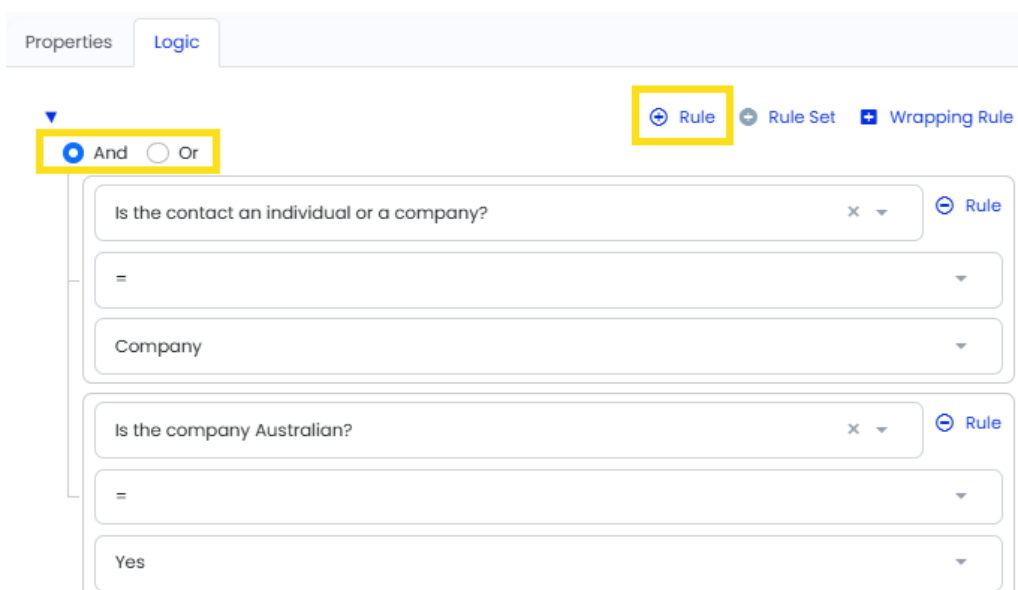
Logic can be based on multiple conditions, meaning several rules are created to set multiple criteria to be met. The multiple conditions are referred to as a Rule Set.

When applying multiple conditions, the available connectors are AND – OR. The connectors control whether the conditions all need to be met (AND) or if only a single condition needs to be met (OR).

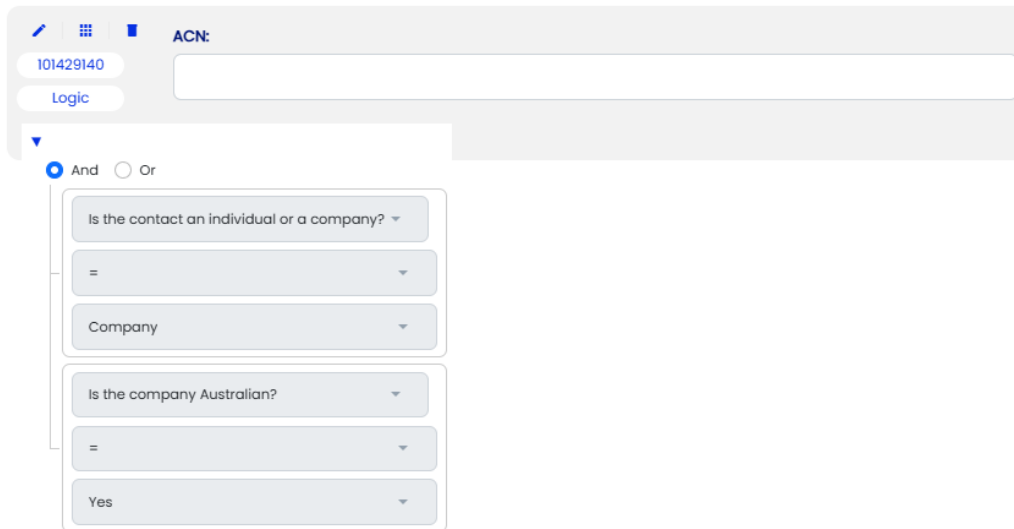


In this example, the ACN is only required where (1) the contact is a company and (2) it is an Australian company. Where both criteria have been met, the ACN question will be asked.

To build this logic, create each rule and use the AND connector.



With this logic applied, the supervisor question will only appear where both conditions are met.

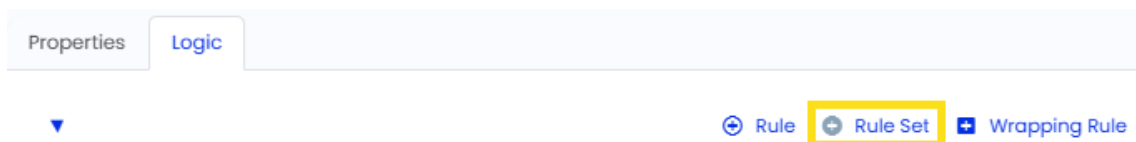


The screenshot shows the 'Logic' tab in the Smarter Drafter interface. At the top, there is a field for 'ACN:' with the value '101429140'. Below this, a logic builder is shown with two conditions connected by an 'And' connector. The first condition is 'Is the contact an individual or a company?' with a dropdown menu set to 'Company'. The second condition is 'Is the company Australian?' with a dropdown menu set to 'Yes'.

## 2.3 Logic with Multiple Rule Sets

Logic can contain multiple separate rule sets.

To achieve this, click Rule Set and build the first set of rules as above, applying the connector as relevant to this specific set.

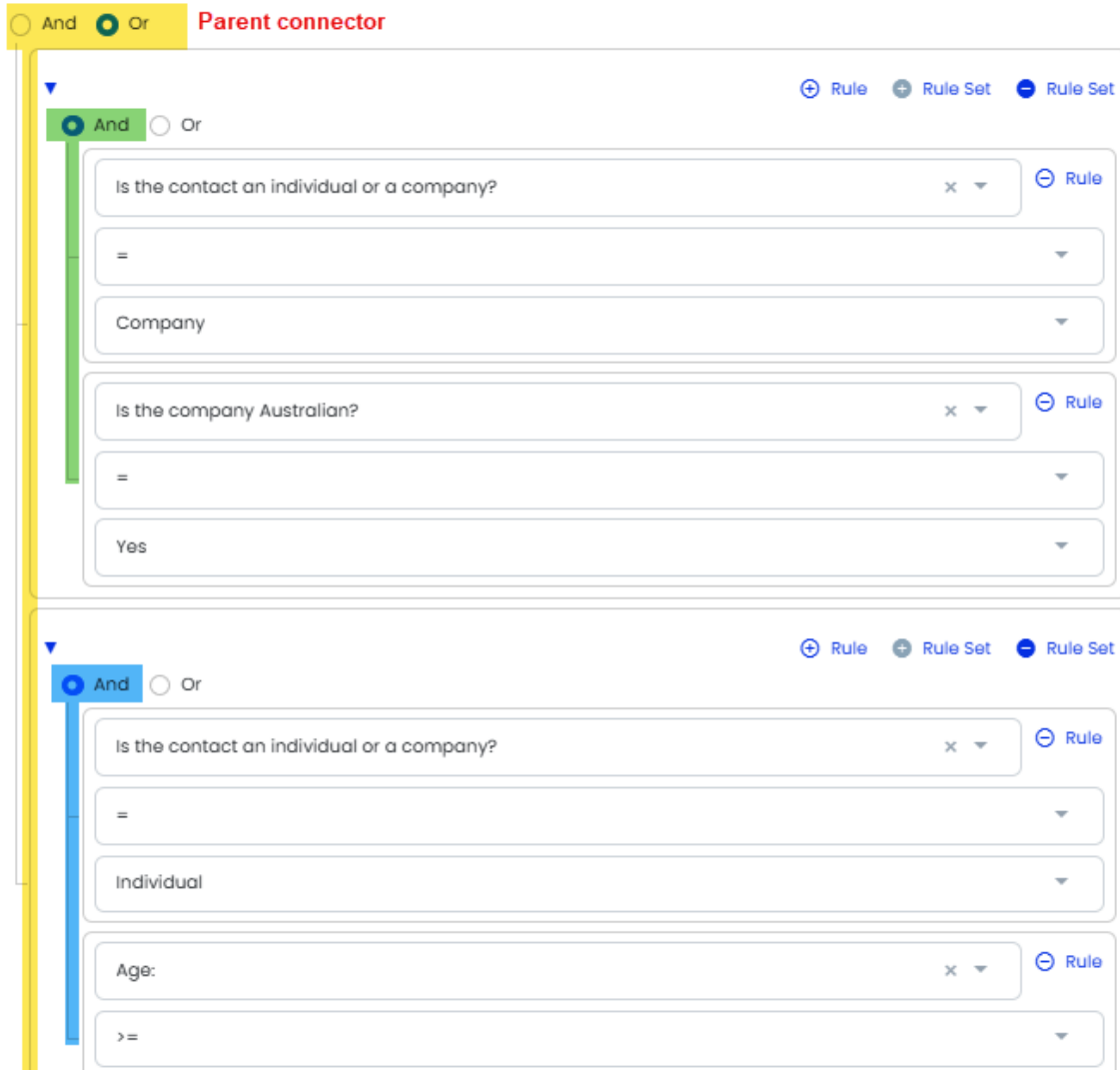


The screenshot shows the 'Logic' tab in the Smarter Drafter interface. At the bottom, there are three buttons: 'Rule', 'Rule Set', and 'Wrapping Rule'. The 'Rule Set' button is highlighted with a yellow box.

Then click Rule Set again and build the next set of rules, and repeat for as many sets as you require.

Once all of the rule sets have been created with their individual connectors applied, set the parent connector to define how the collective group of rule sets should be interpreted together. In the example below, the parent connector has been set as OR, so only one of the rule sets needs to return TRUE for the ultimate response to the logic to return TRUE.





**Parent connector**

And Or

Is the contact an individual or a company?

=

Company

Is the company Australian?

=

Yes

Is the contact an individual or a company?

=

Individual

Age:

>=

## 2.4 Logic with Nested Conditions

Nested logic refers to a parent condition that must be met, followed by optional child logic – meaning there is a key criteria that must be met before the subsequent logic becomes relevant:

>> If the parent logic is FALSE, the expression immediately ends

>> if the parent logic is TRUE, the expression continues to check the next layer of logic

This is where logic can start to handle complex combinations of criteria. The criteria can be as layered and complicated as you can design in.

In this example, the criteria is:

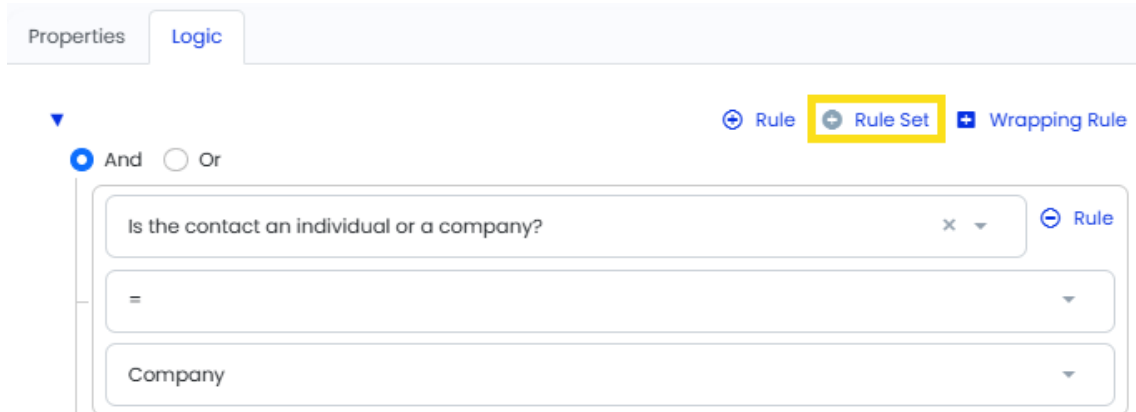
Parent: The contact must be a company  
IF TRUE

Child 1: The company is Australian

OR

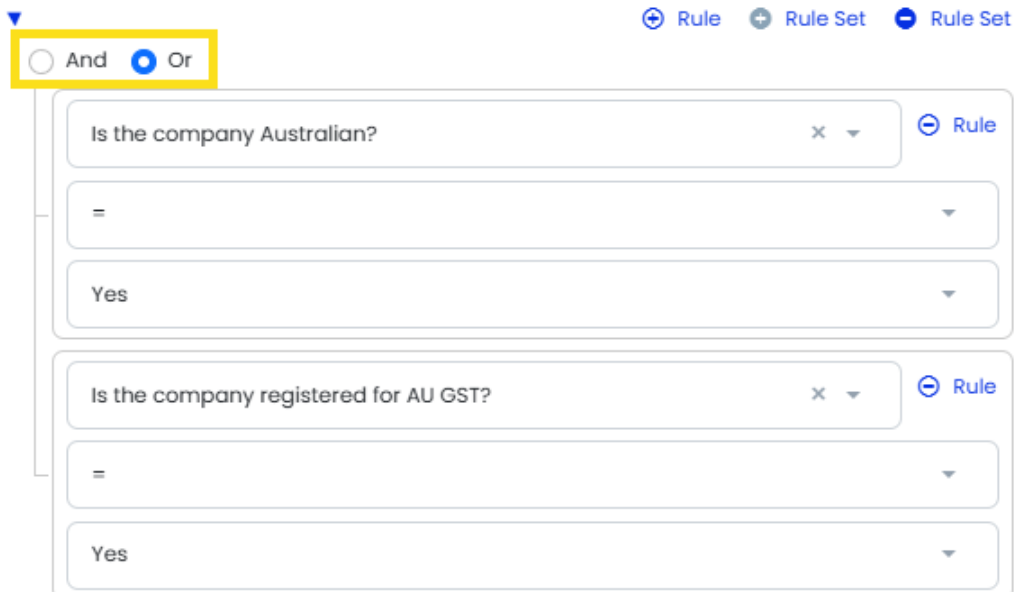
Child 2: The company is not Australian but is registered for AU GST

To achieve this, create the parent rule and select the AND connector. Click +Rule Set.



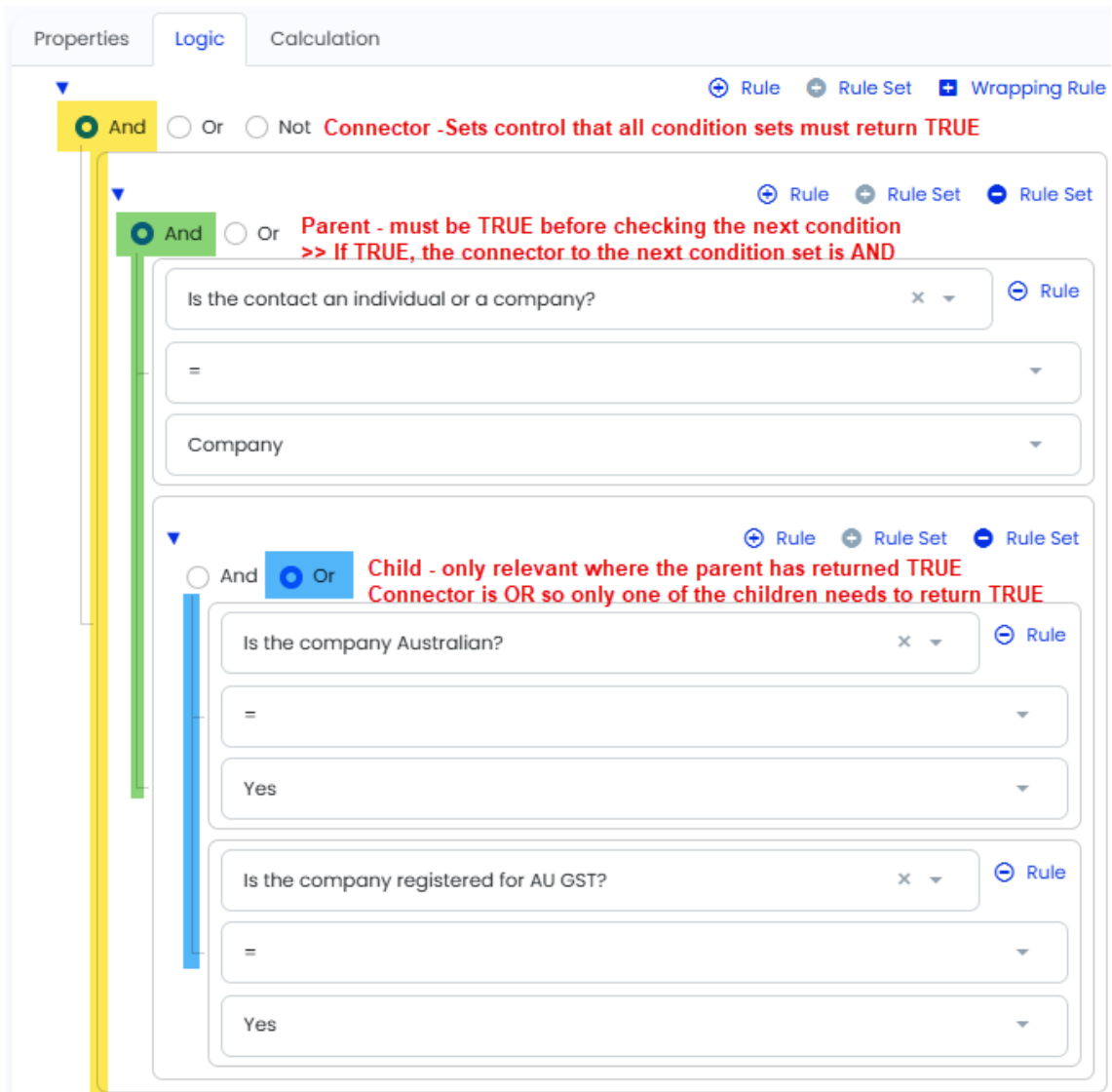
The screenshot shows the 'Logic' tab of the Smarter Drafter interface. At the top, there are tabs for 'Properties' and 'Logic'. Below the tabs, there are three buttons: 'Rule' (with a plus icon), 'Rule Set' (with a plus icon and highlighted with a yellow box), and 'Wrapping Rule' (with a plus icon). Below these buttons, there are two radio buttons: 'And' (selected) and 'Or'. Below the radio buttons, there is a rule configuration box. The first row contains the text 'Is the contact an individual or a company?' followed by a dropdown arrow and a 'Rule' button. The second row contains an equals sign '=' followed by a dropdown arrow. The third row contains the text 'Company' followed by a dropdown arrow.

The next step is to build the OR statement for the child rules.



The screenshot shows the 'Logic' tab of the Smarter Drafter interface. At the top, there are three buttons: 'Rule' (with a plus icon), 'Rule Set' (with a plus icon and highlighted with a yellow box), and 'Rule Set' (with a minus icon). Below these buttons, there are two radio buttons: 'And' (unselected) and 'Or' (selected and highlighted with a yellow box). Below the radio buttons, there are two rule configuration boxes. The first box contains the text 'Is the company Australian?' followed by a dropdown arrow and a 'Rule' button. The second row contains an equals sign '=' followed by a dropdown arrow. The third row contains the text 'Yes' followed by a dropdown arrow. The second box contains the text 'Is the company registered for AU GST?' followed by a dropdown arrow and a 'Rule' button. The second row contains an equals sign '=' followed by a dropdown arrow. The third row contains the text 'Yes' followed by a dropdown arrow.

The next image illustrates the full layout of the nested condition set.



The screenshot displays the 'Logic' tab in the Smarter Drafter interface. It shows a hierarchical structure of nested condition sets. The outermost set is an 'And' connector (highlighted with a yellow bar) with a red note: 'Connector -Sets control that all condition sets must return TRUE'. Inside this set is a 'Parent' condition set (highlighted with a green bar) which is an 'And' connector with a red note: 'Parent - must be TRUE before checking the next condition >> If TRUE, the connector to the next condition set is AND'. The 'Parent' set contains a single condition: 'Is the contact an individual or a company?' equals 'Company'. Below the 'Parent' set is a 'Child' condition set (highlighted with a blue bar) which is an 'Or' connector with a red note: 'Child - only relevant where the parent has returned TRUE Connector is OR so only one of the children needs to return TRUE'. The 'Child' set contains two conditions: 'Is the company Australian?' equals 'Yes' and 'Is the company registered for AU GST?' equals 'Yes'.

## 2.5 Logic with Multiple Nested Rule Sets – Wrapped Sets

Wrapped sets is a further extension of nested logic that can handle multiple conditions in multiple nests.

Adding a wrapped rule applies a higher parent layer to your rule sets. Like nested rules, you need to build out each separate set and then click +Wrapping Rule to set the highest connector to apply to the collection of conditions / rule sets / nests.

To achieve this, create each rule set and/or nested set the parent rule and select the AND connector. Click +Rule Set. Like the image above, the layers will continue to build according to the sets and connectors used.

## 3. Applying Logic in Forms

### 3.1 Sections

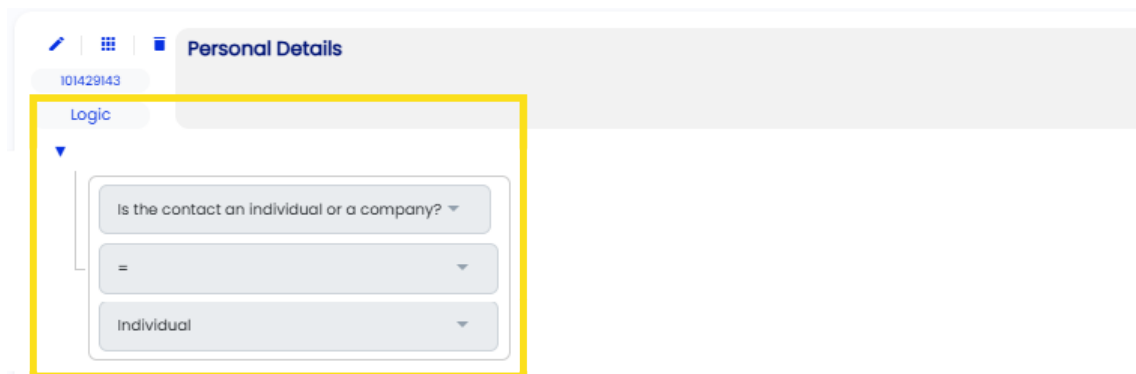
Logic can be applied to a section to set conditions on whether the whole section is displayed or hidden. In this example, the section asks questions about a person and is only relevant if the contact type is an individual. By applying logic at the section level, it can determine whether or not to reveal the section and save applying logic to each separate question.

To apply logic to a section, go to the Logic tab, set the criteria and save.



The screenshot shows the 'Logic' tab for a section. At the top, there are two tabs: 'Section' and 'Logic', with 'Logic' being the active tab. Below the tabs, there are three radio buttons for logical operators: 'And', 'Or', and 'Not'. To the right of these is a 'Wrapping Rule' button. The main configuration area contains three input fields: the first field contains the text 'Is the contact an individual or a company?' with a dropdown arrow and a 'Rule' button; the second field contains an equals sign '=' with a dropdown arrow; the third field contains the word 'Individual' with a dropdown arrow.

The logic pill will appear on the section banner. Click on the pill to see a summary of the logic applied.

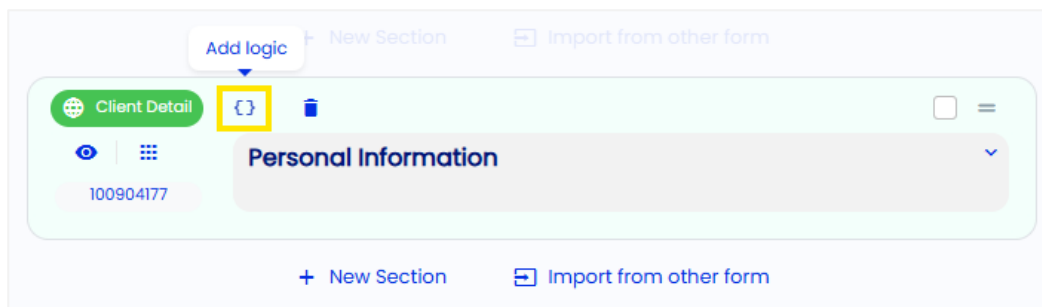


The screenshot shows a section banner titled 'Personal Details' with a sub-header '101429143'. Below the banner, there is a 'Logic' tab. The logic configuration area is highlighted with a yellow box. It contains three input fields: the first field contains the text 'Is the contact an individual or a company?' with a dropdown arrow; the second field contains an equals sign '=' with a dropdown arrow; the third field contains the word 'Individual' with a dropdown arrow.

## 3.2 Section Blocks

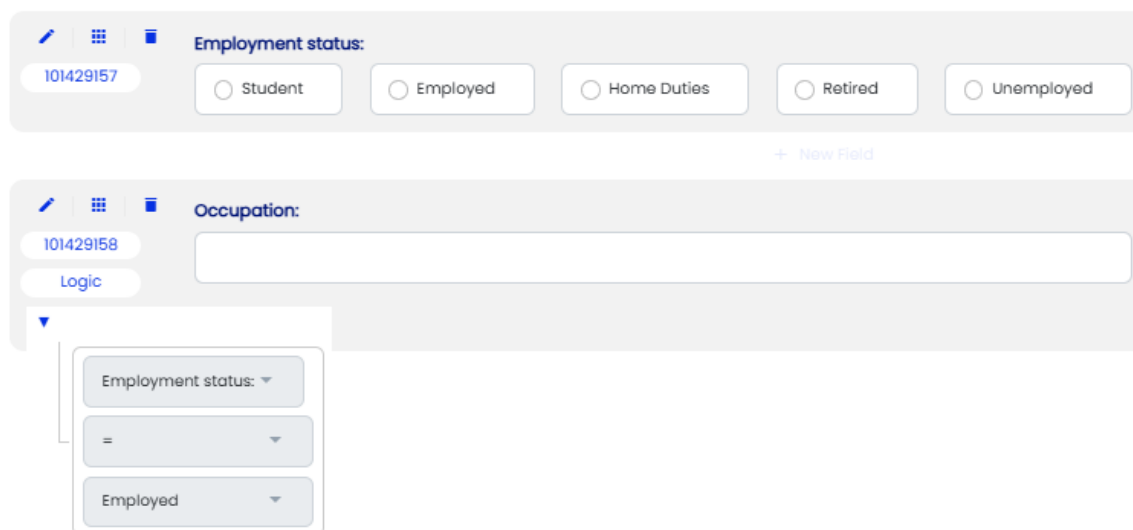
When a section block has been imported into a form, logic can be applied to set conditions for when the section block is or isn't included. If a section block is made up of multiple sections, logic can be applied to each section individually so that you have control over each separate section.

Once the section block has been imported, click the **Add Logic** button in the banner of the section to apply the required logic.



## 3.3 Fields

Logic can be applied to an individual field to set conditions on when the question is to be displayed or hidden. In this example, the occupation will only be asked where the person's employment status is 'employed'.



Setting logic on a field is applied in the same way as a section. In the field properties, go to the Logic tab, set the criteria and save. The logic pill will appear on the field banner and the summary will be displayed when you click on it.

### 3.4 Lists

When creating a select field (radio / drop-down / checkbox) you can apply logic to determine whether to show / hide each individual option in the list.

In this example, the first question provides a choice of fruit or vegetable.

Include fruit or vegetable options?

☒ Fruit

☐ Vegetable

The next question has logic applied to each of the options in the list to determine the choices that will appear in the final list presented to the form filler.

Next to each option, click the logic {} and apply the relevant rule/s.

Other	Label	Value	
<input checked="" type="radio"/>	Apple	1	
<input checked="" type="radio"/>	Banana	2	
<input checked="" type="radio"/>	Orange	3	
<input checked="" type="radio"/>	Pear	4	
<input checked="" type="radio"/>	Carrot	5	
<input checked="" type="radio"/>	Celery	6	
<input checked="" type="radio"/>	Potato	7	
<input checked="" type="radio"/>	Broccoli	8	

Logic Expression For Apple

☐ And ☐ Or ☐ Not

Include fruit or vegetable options?

=

Fruit

Logic Expression For Carrot

☐ And ☐ Or ☐ Not

Include fruit or vegetable options?

=

Vegetable

Depending on whether the user selects fruit or vegetable, the list will adjust only showing them the valid options they can select from:

What is your favourite fruit?

☐ Apple

☐ Banana

☐ Orange

☐ Pear

What is your favourite vegetable?

☐ Carrot

☐ Celery

☐ Potato

☐ Broccoli

## 3.5 Templates

You can attach multiple templates to a form and use logic to determine when each document should or shouldn't be generated.

Attach all template options to the form and then apply logic as required:

Form
Document
Submissions
Settings
Role Mapping

Named Ranges
Replacement Rules
**Templates**

[Reload](#)
[+ New Template](#)
[Download All](#)

Search...

	Name	Uploaded Filename	Last Uploaded	
=	Test Random Play Doc	Test Random Play Doc.docx	30 Nov 2024 9:08 AM	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Download</a> <a href="#">Delete</a>
=	Linda Test Snippet	Linda Test Snippet.docx	12 Mar 2025 12:48 PM	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Download</a> <a href="#">Delete</a>

Logic Expression

And
Or
Not

Do you want to include the xyz form with this document?

=

Yes

Wrapping Rule