



# Build a Simple Form

Module 4 – Build a Simple Form

Version 1.0

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## 1. Create a new Form

Identify the folder location and name of the new Form.

See the **Folders and Forms** guide to follow the steps to create a new form.

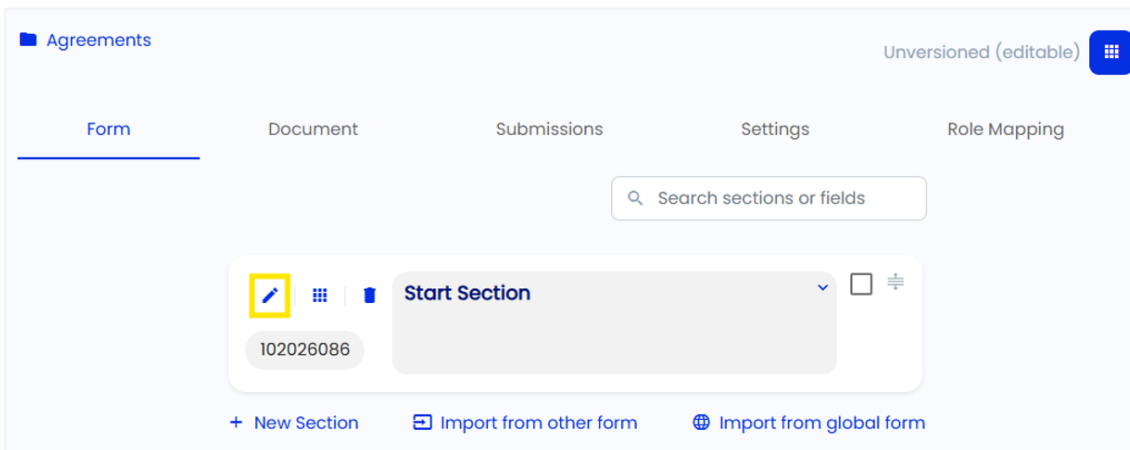
## 2. Build the Form

### 2.1 The Form Builder

A form is made up of sections and fields. See the **Form Sections guide and Pages** and **Field Types** guide.

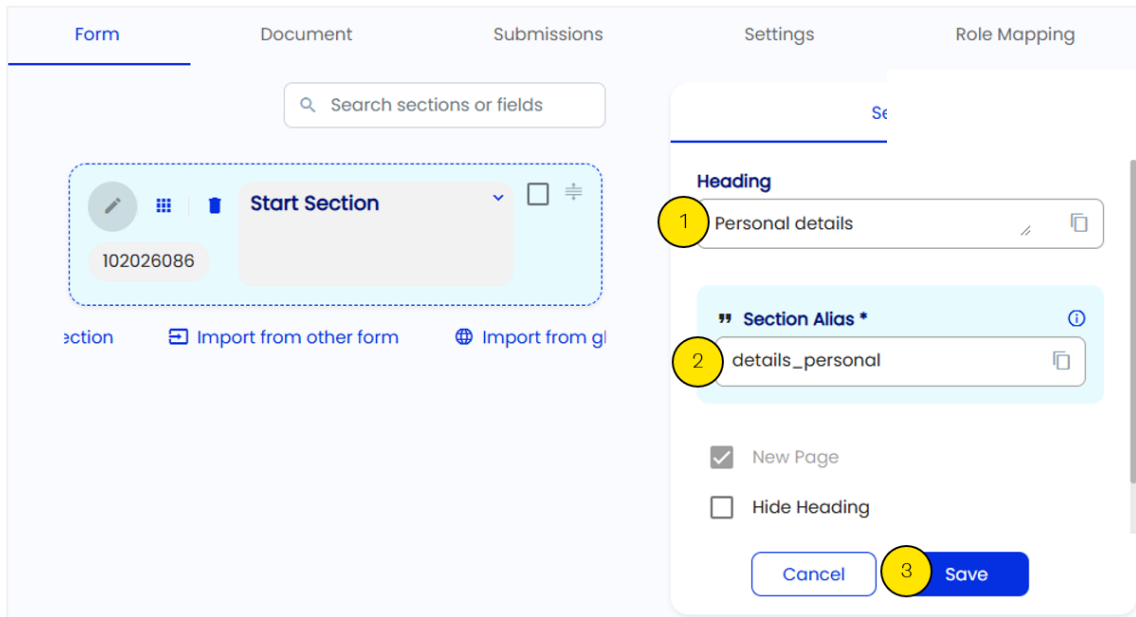
When a new form has been created, the Form Builder will open with an initial section to get you started.

The first step is to rename this section and apply the necessary settings. Click the pencil shaped **edit button** on the section banner.



The screenshot displays the Smarter Drafter Form Builder interface. At the top, the form is titled "Agreements" and is marked as "Unversioned (editable)". Below the title, there are tabs for "Form", "Document", "Submissions", "Settings", and "Role Mapping". The "Form" tab is currently selected. A search bar labeled "Search sections or fields" is positioned above the main content area. The main content area features a "Start Section" banner with a pencil icon and a trash icon. Below the banner, there are three buttons: "+ New Section", "Import from other form", and "Import from global form".

1. Enter **Heading** details. In this example, the section relates to **Personal details**, so that has been applied as the heading.
2. A **Section Alias** is required for data sharing purposes and must be unique within this form. As you enter the heading, the section alias will automatically build and you can keep what appears (data sharing is covered in a separate guide).
3. Click **Save** and **Close**.



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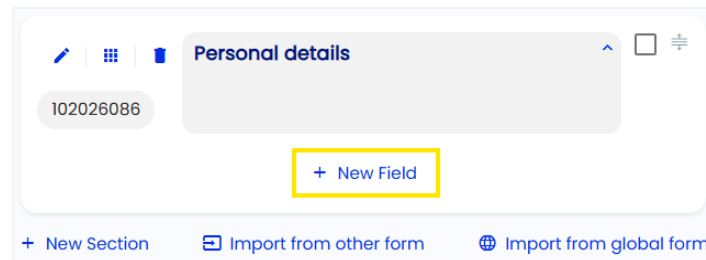
Note: Always name the section before creating fields. If the section is not named, it will prevent data sharing from working.

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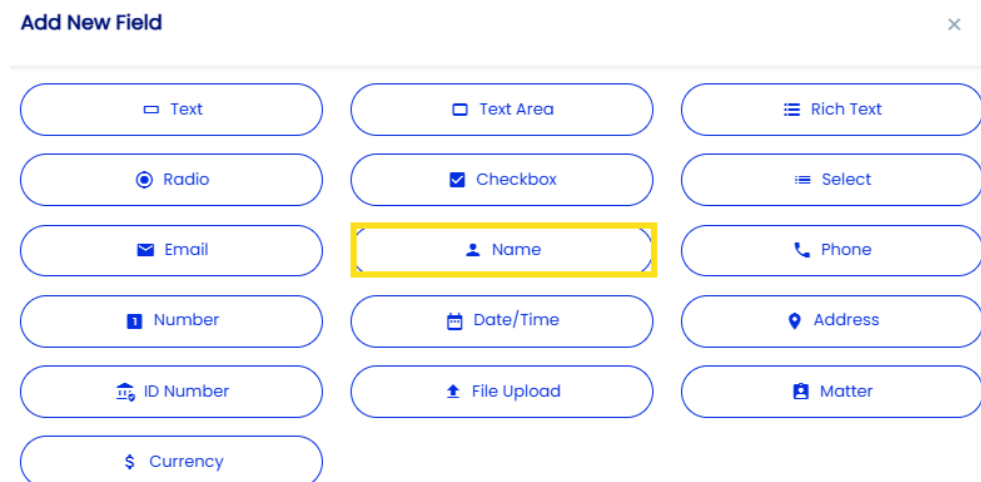
### 3. Add Fields

There are many different field types and all fields have properties that can be applied, modified or customised (see Field Types guide).

To add a field to the form, click **New Field** within the section.



A pop up opens, offering a range of field types. In this example, a **Name** is the first field used. Click the required button.



#### 3.1 Add a Name

1. If you wish to change the field type, use the drop-down menu to make a new selection.
2. The **Question** is the text that appears to guide the form filler to enter the correct details.
3. A **Field Alias** is required for data sharing purposes and must be unique within this section. Smarter Drafter may reveal a prompt if there is a field alias in use that matches the field type. In this example, "name\_full" is the field alias associated with full names. Ensure the alias applied aligns with your organisation's naming conventions. (Field aliases covered in a separate guide.)
4. Under **Case**, select "none". Doing this will prevent Smarter Drafter from adjusting the case on a name such as McDonald, McGregor etc.

5. Click **Save** and **Close**.

**Properties**

**Field type**

1 Name

**Question \*** [Copy](#)

2 Full legal name: ✓

**Field Alias** ?

Enter Field Alias here (optional)

3 Name\_Full

**Question type**

☒ Required ☐ Optional

☐ Hide Question

**Casing**

4 - None - x ▼

**Supporting text**

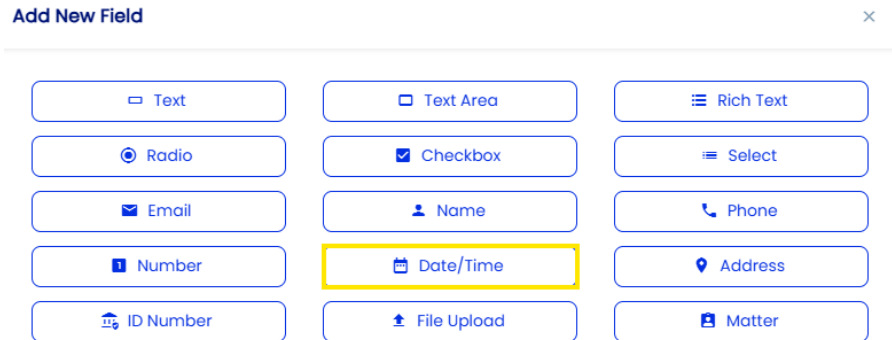
Text

Cancel **5 Save**

## 3.2 Add a Date of Birth

To create a date of birth field, follow these steps:

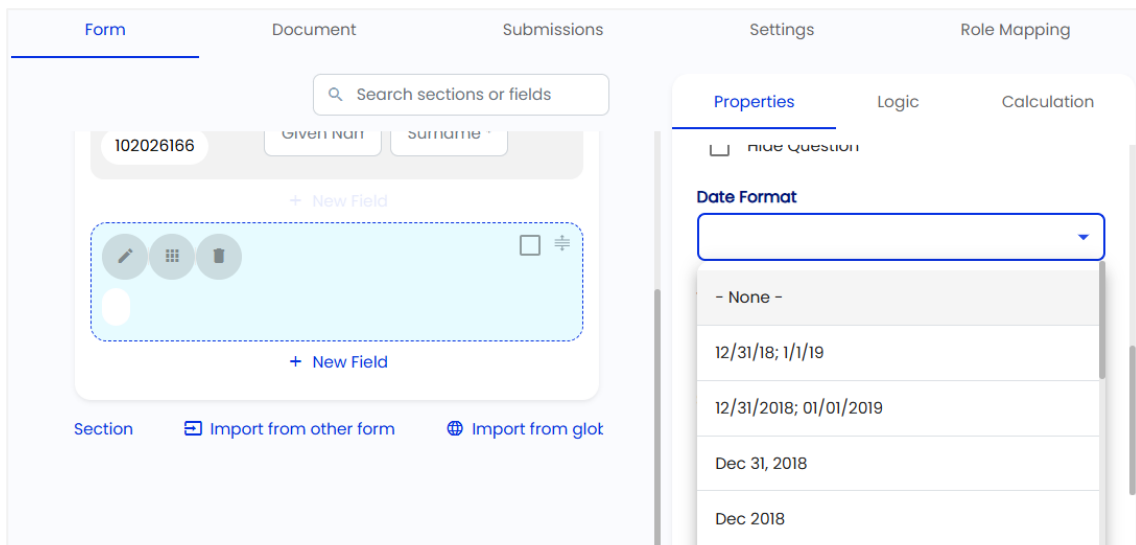
1. Click **New Field** and select **Date/Time**.



The 'Add New Field' dialog box displays a grid of field types. The 'Date/Time' option is highlighted with a yellow border. The grid includes the following options:

Text	Text Area	Rich Text
Radio	Checkbox	Select
Email	Name	Phone
Number	<b>Date/Time</b>	Address
ID Number	File Upload	Matter

2. Determine whether the question is **required** or **optional** and select the relevant radio button.
3. Add a **Question** and **Field Alias** (similar to the process used above in the name field).
4. Scroll down and apply a **Date Format**.



The screenshot shows the 'Form' editor interface. On the left, a form preview displays a 'Given Name' field with the value '102026166' and a 'Surname' field. Below the preview, there are buttons for 'Section', 'Import from other form', and 'Import from global'. On the right, the 'Properties' tab is active, showing the 'Date Format' dropdown menu. The dropdown is open, displaying the following options:

- None -
- 12/31/18; 1/1/19
- 12/31/2018; 01/01/2019
- Dec 31, 2018
- Dec 2018

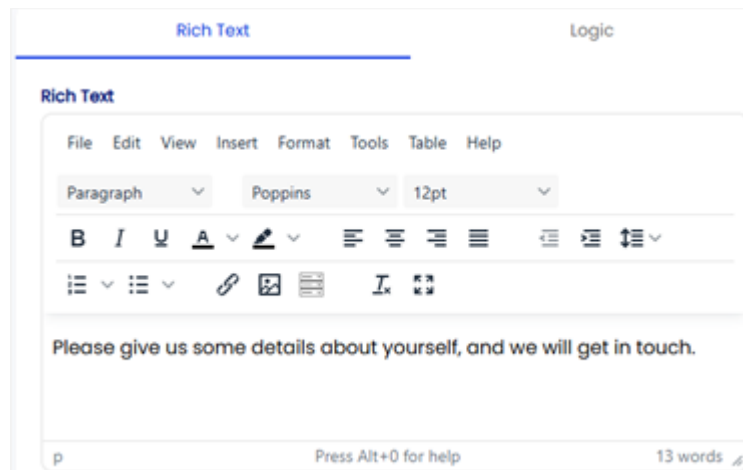
## 3.3 Email and Phone Number Fields

These field types have simple properties to the fields above. Click **New Field** to create and apply required settings.

### 3.4 Rich Text

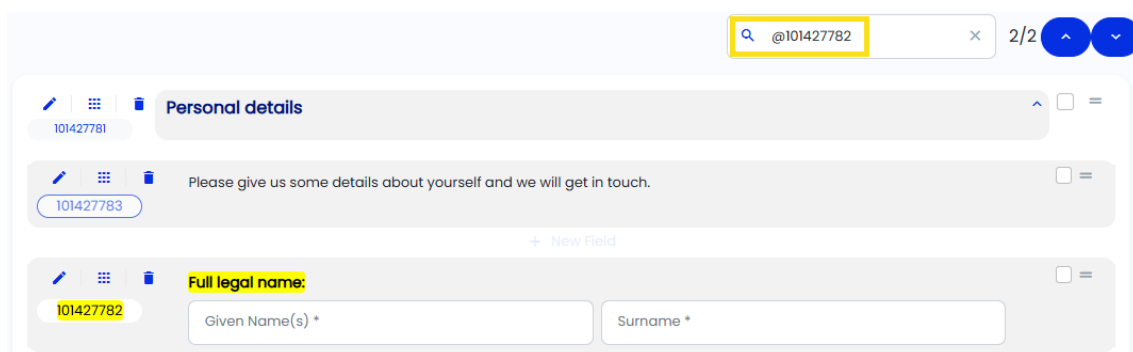
A rich text field allows you to place a message in the form. It may be used to give instructions or give explanations. Rich text fields have a formatting toolbar to adjust the appearance of the text.

Click **New Field** and select **Rich Text**. Type a message and format the text in the editor. Click **Save**.



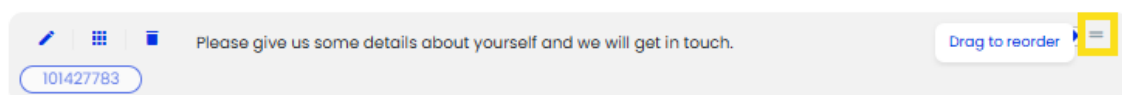
## 4. Field IDs

The field ID number is a unique identifier. Feedback and errors may reference the field name and/or the field ID. If you need to find a field in a form and you only have the field ID, you can search the form using the ID number. Ensure you include the @ symbol, e.g.:



## 5. Organising the form

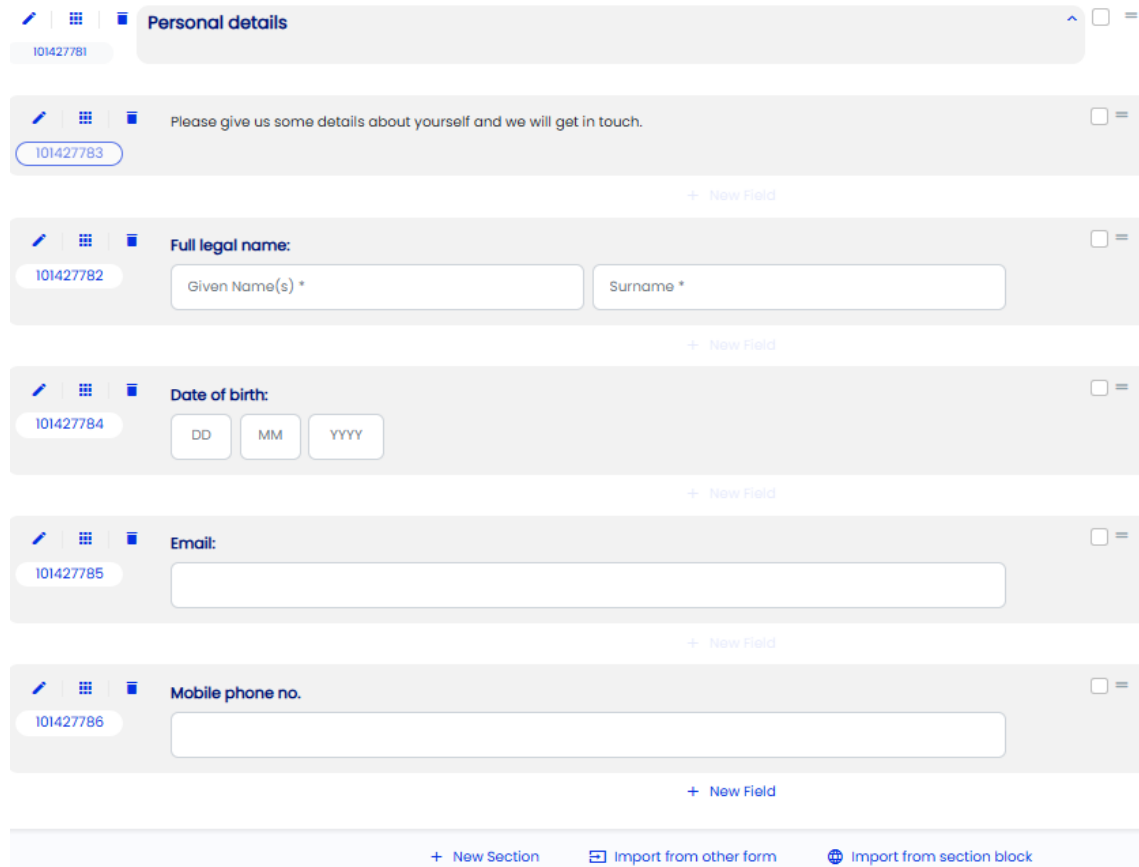
To rearrange the order of the fields, click on the reorder button on the right of the field and drag the field into place.





## 6. The Completed Form

The form created in this example looks like this:



The screenshot displays a form builder interface for a 'Personal details' section. The interface includes a top bar with a title 'Personal details' and a toggle switch. Below this, there are several form blocks, each with a unique ID (101427781 to 101427786) and a title. The first block is a text input field with the placeholder 'Please give us some details about yourself and we will get in touch.' The second block is a text input field with the placeholder 'Full legal name:'. The third block is a text input field with the placeholder 'Date of birth:'. The fourth block is a text input field with the placeholder 'Email:'. The fifth block is a text input field with the placeholder 'Mobile phone no.'. Each block has a '+ New Field' button below it. At the bottom of the interface, there are three buttons: '+ New Section', 'Import from other form', and 'Import from section block'.

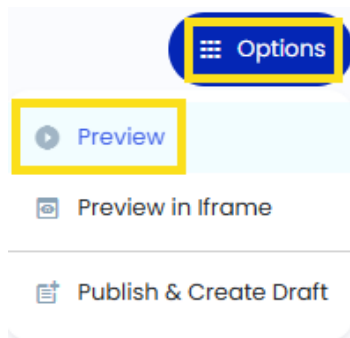
While this form is in the early stages, it can be tested to check that the questionnaire and fields work as you expect.

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Note: This form is a simple set of questions and testing will only run the questionnaire. The full process of creating an automation and linking a template has not been completed so if this form is submitted, it can't produce a document yet.

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To test the form, click on the **waffle Options** button and select **Preview**.



A pop up will open where you can select who will be able to see the final form. Click the appropriate option and then click **Start Form**.

**Submission**

**Who can access this submission?**

☒ Myself only

☐ Everyone

☐ Specific users or groups

**Start Form**

The form will open in a separate tab for you to complete and review.

### Personal details

Please give us some details about yourself and we will get in touch.

**Full legal name:**

Given Name(s) *	Surname *
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☐ Use Placeholder

**Date of birth:**

DD	MM	YYYY
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**Email:**

☐ Use Placeholder

**Mobile phone no.**

☐ Use Placeholder

Submit Form

When you are finished, you can either close the tab or click the **Submit Form** button. Either way, it will appear in the Submissions list, but neither will produce a document. (Submissions are covered in a separate guide.)