

Clone Forms, Section Blocks, Sections, Fields and Rules

Module 12 – Cloning

Version 1.0

Table of Contents

1.	Cloning.....	2
1.1	What is Cloning?	2
1.2	When to use Cloning.....	2
2.	Cloning a Form.....	2
2.1	How to Clone a Form	3
3.	Cloning a Section Block	4
3.1	How to Clone a Section Block.....	4
4.	Cloning a Section	5
4.1	How to Clone a Section Within the Same Form.....	5
4.2	How to Clone a Section Into Another Form.....	6
4.3	How to Import a Section From Another Form.....	7
5.	Cloning a Field.....	7
5.1	How to Clone a Field into the Same Section	8
5.2	How to Clone a Field into a Different Section.....	8
6.	Cloning Rules	9
6.1	How to Clone a Conditional Rule.....	9
6.2	How to Clone a Universal Replacement Rule.....	9
6.3	How to Clone a Form Replacement Rule.....	10

1. Cloning

1.1 What is Cloning?

Cloning allows you to copy work that has already been built in Smarter Drafter, including:

- **Forms:** Create a copy of the whole form
- **Section Blocks:** Create a copy of the whole section block
- **Sections:** Create a copy of a section within the same form or import into/from another form
- **Fields:** Create a copy of the field in the same section or another section within the same form

Rules can also be cloned:

- **Conditional rules:** Create a copy of the rule within the same form
- **Universal replacement rules:** Create a copy of the rule within the universal rule set
- **Form replacement rules:** Create a copy of the rule within the same form

1.2 When to use Cloning

Cloning is useful where something already exists that is similar to what you need in a different form. Rather than rebuilding from scratch, you can leverage off the previous work to create a copy of it and tweak it to suit your new requirements.

NOTE: If you have cloned the same form/section multiple times, consider whether a section block is suitable.

2. Cloning a Form

Various forms may have similar requirements so cloning can greatly speed up the form development process by instantly replicating an existing form and rebuilding all of the associated features in a new form. This could be particularly useful with suites of court forms where there is much uniformity to the basic document structure.

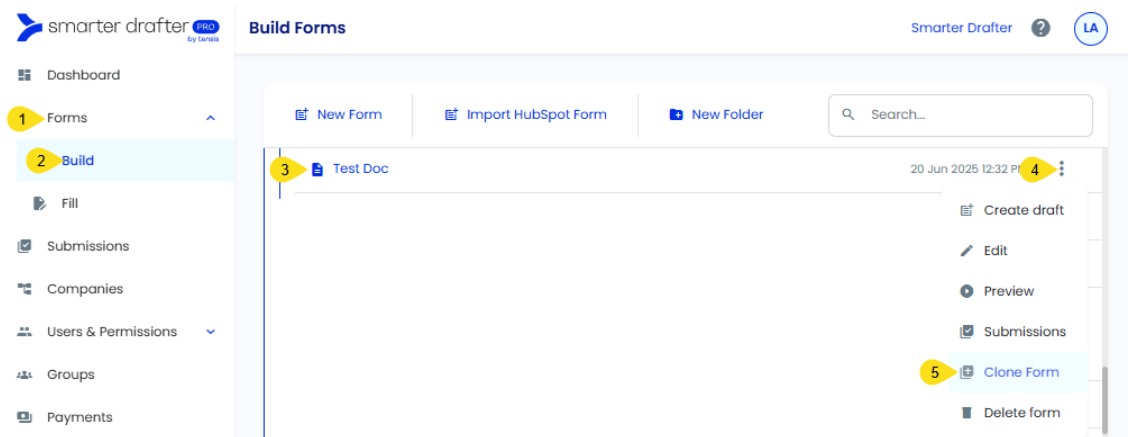
When a form is cloned, the whole form is reproduced with all logic, conditional rules, replacement rules, repeats and attached templates.

NOTE: Templates are independently uploaded to a form. The template attached to the new cloned form is a copy and is not associated with the original form. After cloning, each form and template can be updated without impacting the other.

2.1 How to Clone a Form

To clone a form:

1. Click **Forms**.
2. Click **Build**.
3. Navigate the **forms folder** and locate the original form required to make the clone.
4. Click the **kebab menu** beside the form.
5. Click **Clone Form**.



The pop-up will open to configure the new form to be created.

Clone Form

×

Form name *

6

Test Doc 2

✓

Form Alias * ?

7

test_doc_2

✓

Copy

Folder *

8

Linda

×

▼

Cancel

9

Clone

6. Give the form a unique **name**.
7. Enter a unique **form alias**.
8. Select the relevant **folder**.
9. Click **Clone**.

The new form will open, ready for you to edit.

CAUTION

NOTE: The cloned form will not connect to data entered or submissions generated on the original form. If you are using cloning to create an updated version of the same form, this loss could be detrimental to users who want to clone a previous submission which has since been disconnected.

3. Cloning a Section Block

Cloning a section block is exactly like cloning a form.

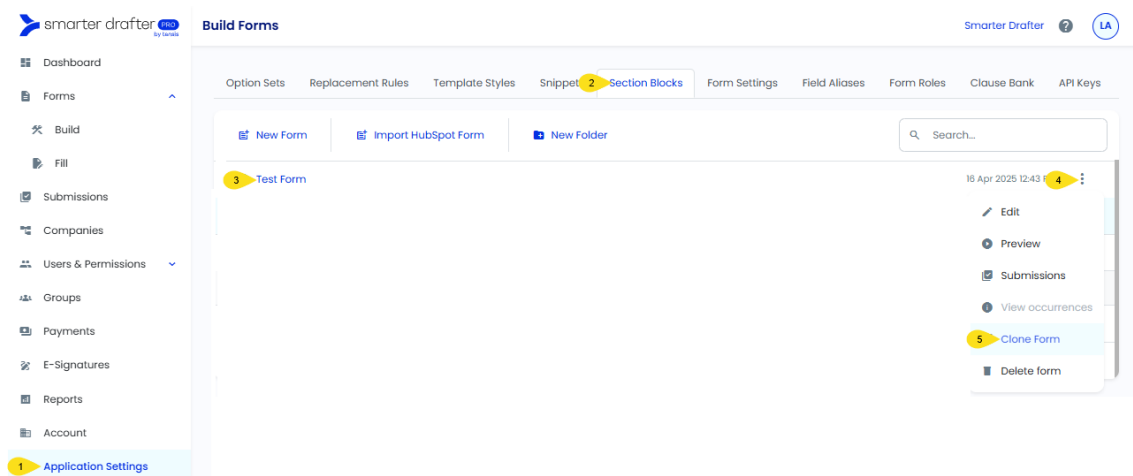
When a section block is cloned, the whole form is reproduced with all logic, conditional rules, replacement rules, repeats and attached content blocks.

NOTE: Content blocks are independently uploaded to a section block. The content block attached to the new cloned section block is a copy and is not associated with the original section block. After cloning, each section block and content block can be updated without impacting the other.

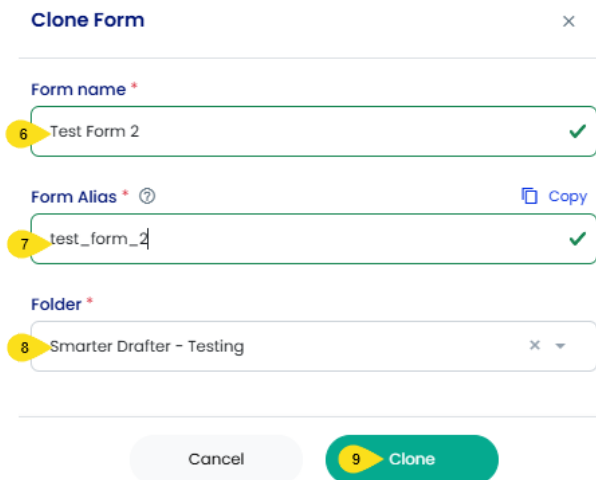
3.1 How to Clone a Section Block

To clone a section block:

1. Click **Application Settings**.
2. Click **Section Blocks**.
3. Navigate the **forms** folder and locate the original form required to make the clone.
4. Click the **kebab menu** beside the form.
5. Click **Clone Form**.



The pop-up will open to configure the new section block to be created.



Clone Form [X]

Form name *
6 Test Form 2 ✓

Form Alias * ? [Copy]
7 test_form_2 ✓

Folder *
8 Smarter Drafter - Testing X ▾

Cancel Clone 9

6. Give the section block a unique **name**.
7. Enter a unique **form alias**.
8. Select the relevant **folder**.
9. Click **Clone**.

The new section block will open, ready for you to edit.

4. Cloning a Section

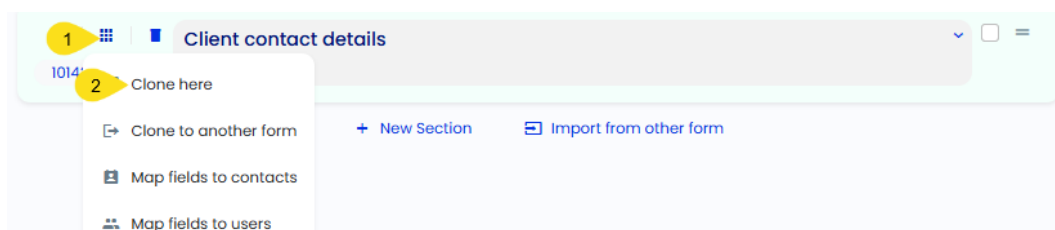
A section can be cloned in a few different ways:

- **By cloning a section within the same form**
>> the same section will be recreated below the existing section, and will open for editing
- **By cloning a section into another form**
>> the section will be recreated at the end of the other form but you will remain in the original form
- **By importing a section in from another form**
>> you will be able to select another form and multi-select the selections to be recreated in your form

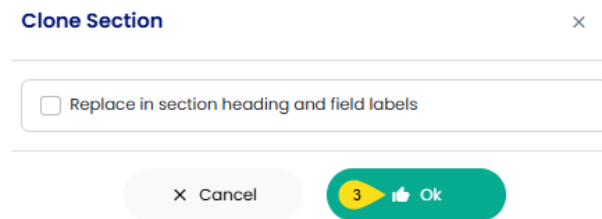
4.1 How to Clone a Section Within the Same Form

To clone a section within the same form:

1. On the section, click the **waffle menu**.
2. Select **Clone here**.



The pop-up will open to configure the new section to be created.



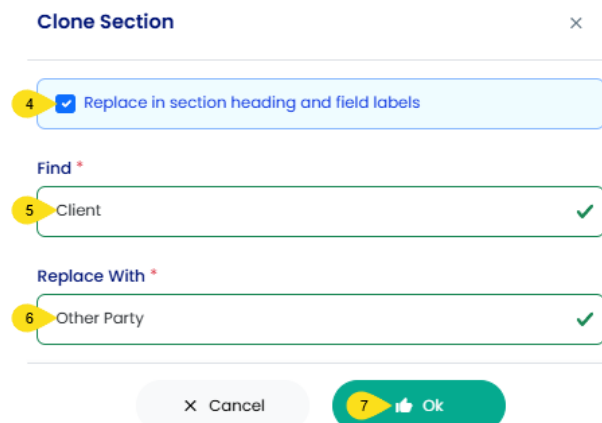
Clone Section [X]

☐ Replace in section heading and field labels

[X] Cancel [3] [thumbs up] Ok

There is an option to **Replace in section heading and field labels** which allows you to automatically have section/field references updated, e.g. by cloning the **client** section to create the **other party** section, and using this feature to automatically change the word **client** to **other party** in the cloned version.

3. If you don't need to use this feature, click **OK**.
4. To use this feature, tick the **Replace in section heading and field labels** checkbox.
5. Enter the **text to be replaced**, e.g. Client.
6. Enter the **text to use** as the replacement, e.g. Other Party.
7. Click **OK**.



Clone Section [X]

4 ☒ Replace in section heading and field labels

Find *

5 Client ✓

Replace With *

6 Other Party ✓

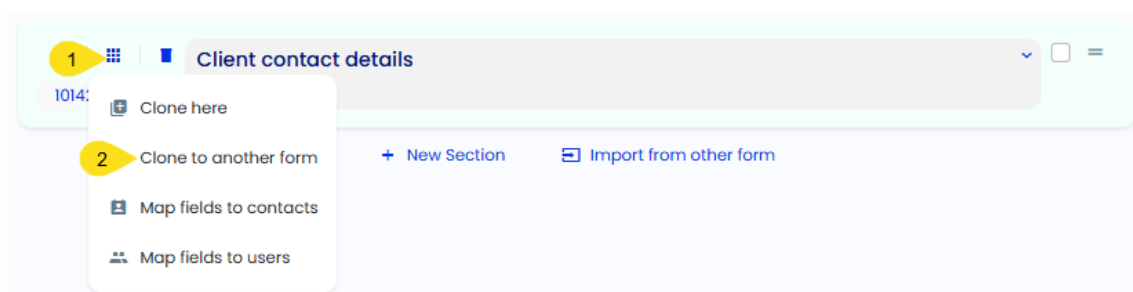
[X] Cancel [7] [thumbs up] Ok

The new section will open, with any label adjustments applied and ready for you to edit.

4.2 How to Clone a Section Into Another Form

To clone a section into another form:

1. On the section, click the **waffle menu**.
2. Select **Clone to another form**.



1 [waffle menu icon] Client contact details [dropdown arrow] [checkbox] [=]

1014:

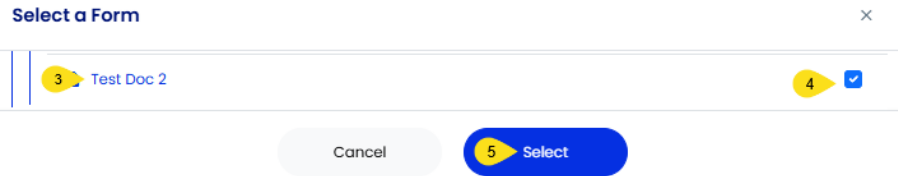
2 [Clone to another form]

[Map fields to contacts]

[Map fields to users]

+ New Section [Import from other form]

3. Navigate the **forms folder** and locate the form where the section is to be cloned to.
4. Tick the **checkbox**.
5. Click **Select**.



The dialog box titled "Select a Form" shows a list with one item: "Test Doc 2". To the left of the item is a yellow circle with the number 3. To the right is a yellow circle with the number 4 and a checked checkbox. Below the list are two buttons: "Cancel" and "Select" (with a yellow circle and number 5).

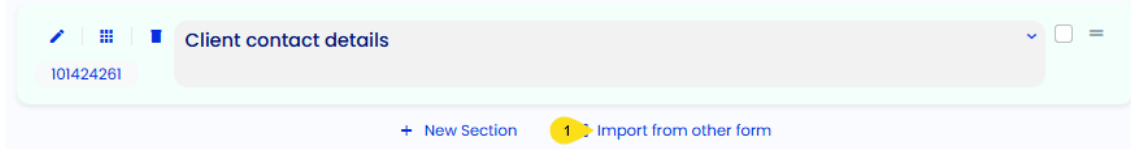
The section will be cloned to the end of the selected form.

NOTE: You will not be automatically navigated to the other form where the section was cloned to. You will need to manually open the other form and make any adjustments required.

4.3 How to Import a Section From Another Form

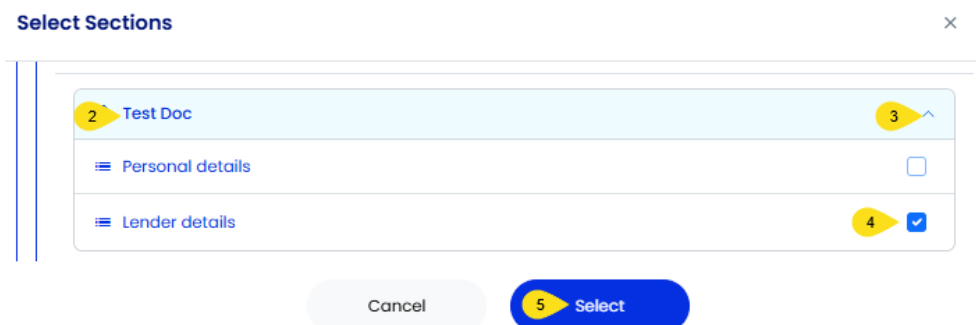
To import a section from another form:

1. On the section, click the **Import from other form** button.



The image shows a form section header for "Client contact details" with ID "101424261". Below the header, there are two buttons: "+ New Section" and "Import from other form" (with a yellow circle and number 1).

2. Navigate the **forms folder** and locate the form where the section is to be cloned to.
3. Click the **down-arrow** of the relevant form to expand the list of sections.
4. Tick the **checkbox** of the section/s required.
5. Click **Select**.



The dialog box titled "Select Sections" shows a list with two items: "Test Doc" and "Lender details". To the left of "Test Doc" is a yellow circle with the number 2. To the right of "Test Doc" is a yellow circle with the number 3 and an unchecked checkbox. Below "Test Doc" is "Personal details" with an unchecked checkbox. Below "Personal details" is "Lender details" with a yellow circle and number 4 and a checked checkbox. Below the list are two buttons: "Cancel" and "Select" (with a yellow circle and number 5).

The selected sections will be inserted, ready for you to edit.

5. Cloning a Field

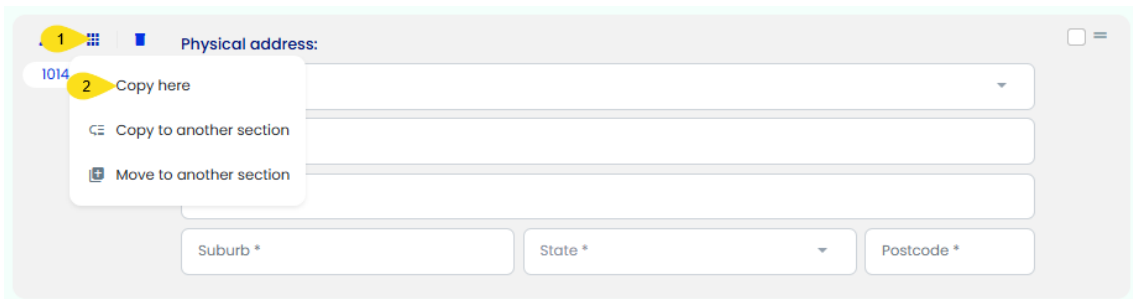
A field can be cloned in a two different ways:

- By cloning the field into the same section of that form
>> the same field will be recreated below the existing field, and will open for editing
- By cloning the field into a different section of that form
>> the field will be recreated at the end of the selected section, and will open for editing

5.1 How to Clone a Field into the Same Section

To clone a field into the same section:

1. On the field, click the **waffle menu**.
2. Select **Copy here**.



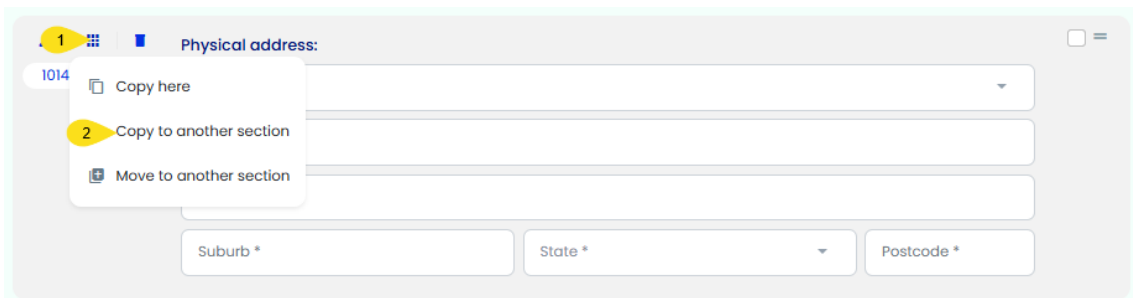
The screenshot shows a form titled 'Physical address:'. The first field contains the value '1014'. A waffle menu is open on this field, showing three options: 'Copy here' (highlighted with a yellow circle and the number 2), 'Copy to another section', and 'Move to another section'. Below the waffle menu, there are three input fields: 'Suburb *', 'State *', and 'Postcode *'.

The field will be recreated below the existing field and will open, ready for you to edit.

5.2 How to Clone a Field into a Different Section

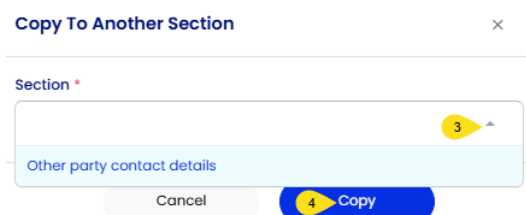
To clone a field into a different section:

1. On the field, click the **waffle menu**.
2. Select **Copy to another form**.



The screenshot shows the same 'Physical address:' form. The waffle menu is open on the first field, and 'Copy to another section' is highlighted with a yellow circle and the number 2. The other options are 'Copy here' and 'Move to another section'.

3. Click the **down-arrow** of the section list and locate the section where the field is to be cloned to.
4. Click **Copy**.



The screenshot shows a dialog box titled 'Copy To Another Section'. It has a close button (X) in the top right corner. Below the title, there is a label 'Section *' and a dropdown menu. The dropdown menu is open, showing a list of sections. The section 'Other party contact details' is highlighted with a blue background and a yellow circle with the number 3. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Copy' (highlighted with a yellow circle and the number 4).

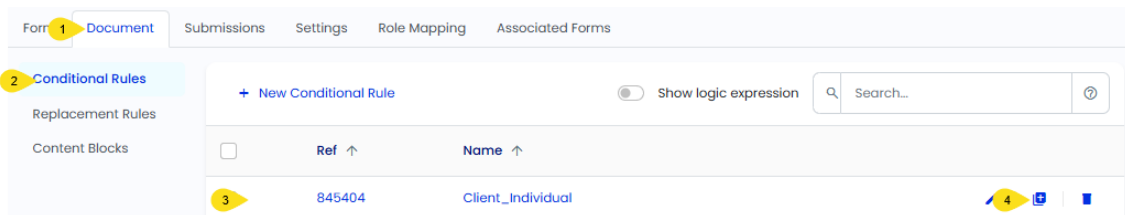
The field will be recreated at the end of the selected section and will open, ready for you to edit.

6. Cloning Rules

6.1 How to Clone a Conditional Rule

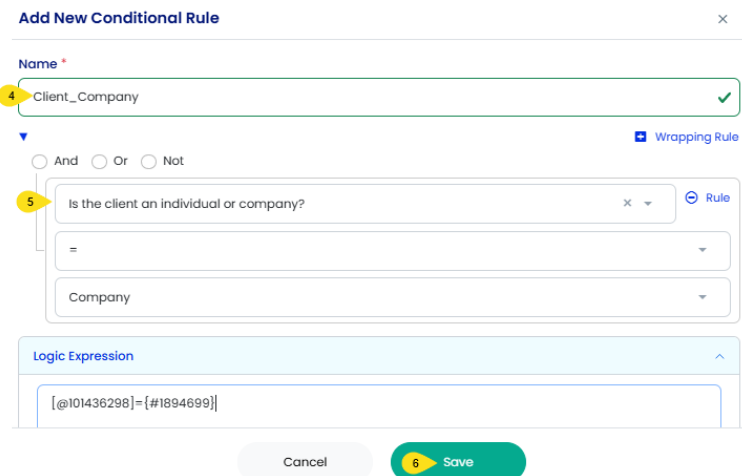
To clone a conditional rule:

1. On the form, go to the **Document** tab.
2. Click **Conditional Rules**.
3. Navigate the **list of rules** and locate the rule to clone.
4. Click the **+ Clone** button.



The screenshot shows the 'Document' tab selected. Under 'Conditional Rules', there is a '+ New Conditional Rule' button and a 'Show logic expression' toggle. A table lists existing rules with columns 'Ref' and 'Name'. One rule with Ref '845404' and Name 'Client_Individual' is highlighted, and a '+ Clone' button is visible next to it.

The pop-up will open to configure the new conditional rule to be created.



The 'Add New Conditional Rule' pop-up is shown. It has a 'Name' field with the value 'Client_Company'. Below it are radio buttons for 'And', 'Or', and 'Not'. A logic expression is defined: 'Is the client an individual or company?' followed by an equals sign and 'Company'. At the bottom, there is a 'Logic Expression' field containing the code '[@101436298]=[#1894699]'. The 'Save' button is highlighted.

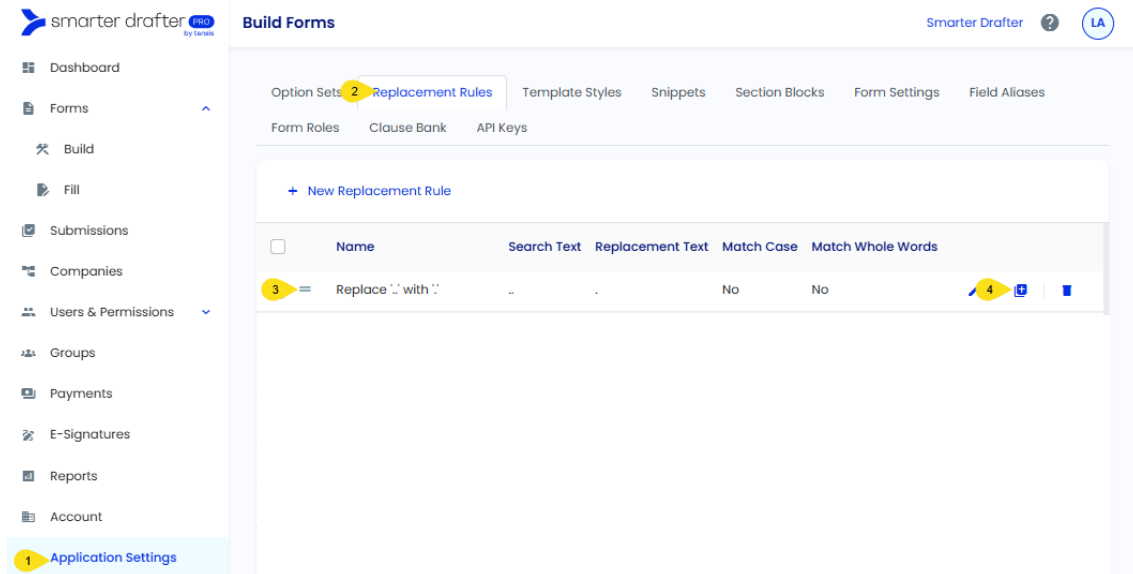
5. Give the new rule a **unique name**.
6. Adjust the **conditions** of the rule as required.
7. Click **Save**.

6.2 How to Clone a Universal Replacement Rule

To clone a universal replacement rule:

1. Go to the **Application Settings**.
2. Click **Replacement Rules**.
3. Navigate the **list of rules** and locate the rule to clone.

- Click the **+ Clone** button.



The pop-up will open to configure the new replacement rule to be created.

Add New Replacement Rule
×

Name *

5 Replace "." with "

Search text *

6 .

Replacement text

.

Match case

☐ Yes
☒ No

Whole words only

☐ Yes
☒ No

Unconditional

Cancel

7 Save

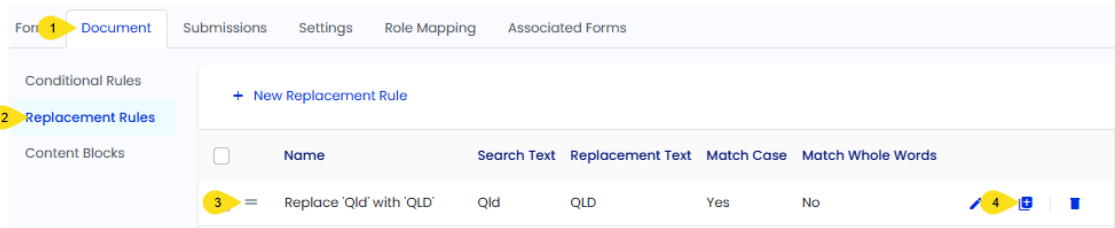
- Give the new rule a **unique name**.
- Adjust the **settings** of the rule as required.
- Click **Save**.

6.3 How to Clone a Form Replacement Rule

To clone a form replacement rule:

- On the form, go to the **Document** tab.
- Click **Replacement Rules**.
- Navigate the **list of rules** and locate the rule to clone.

- Click the **+ Clone** button.



The pop-up will open to configure the new replacement rule to be created.

Replacement Rule Properties

Name *

5 Replace 'Qld' with 'QLD'

Search text *

6 Qld

Replacement text

QLD

Field Replacement

Match case

Yes

No

Whole words only

Yes

No

Unconditional

Cancel

7 Save

- Give the new rule a **unique name**.
- Adjust the **settings** of the rule as required.
- Click **Save**.