

Create Option Lists and Option Sets

Module 13 - Option Lists and Option Sets

Version 1.0

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1. Option Lists

1.1 What is an Option List?

An Option List is a list of choices given to a form filler to select from when answering a question that needs to offer various choices. The builder will use the relevant select field type to suit the question and then create the custom list of options.

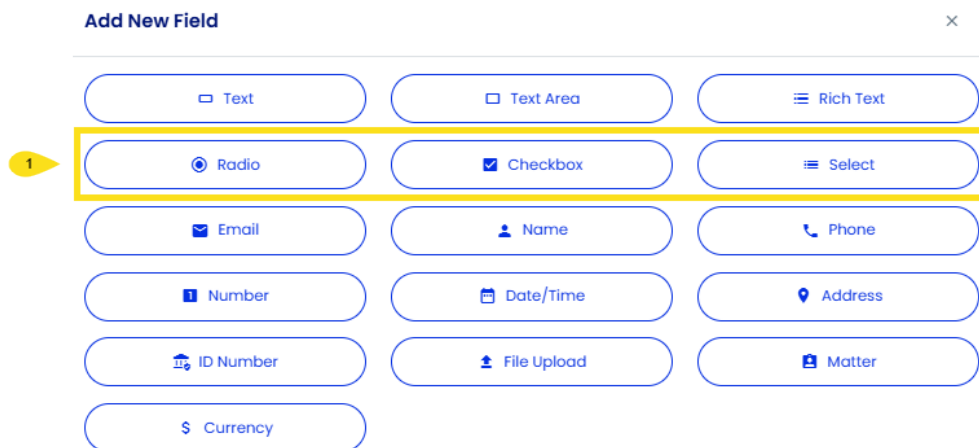
1.2 When to use an Option List

An Option List is used when a form filler is required to make a selection from multiple options, e.g. to answer a question that uses a radio button, select drop-down or checkbox field. Option Lists are created to provide the specific choices a form filler can select from when answering these question types.

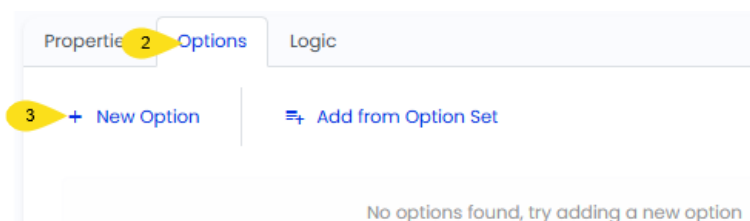
2. How to Create an Option List

To create an Option List:

1. In the form, create a new field and select the required field type.



2. In the field properties, go to the **Options** tab.
3. Click **+ New Option**.



4. Give the option a **label/name**. The value will automatically be applied in numerical order.
5. Click **+ Add More** and create additional labels/options as required.
6. Set the **layout**, e.g. select horizontal for the options to lay beside each other or select vertical for a list.

Properties

Options

Logic

5 + Add More

Add from Option Set

Other	Label	Value
= <input checked="" type="radio"/> 4	Option 1	1
= <input type="radio"/>	Option 2	2
= <input type="radio"/>	Option 3	3

6 Layout type

☒ Horizontal
 ☐ Vertical

Cancel

7 Save

7. You now have a basic list of options. If this is all that is required, click **Save**.

NOTE: The value is automatically applied in numerical order and is used as a simple reference to the option in other features such as calculations. Rather than having to reference the whole option label/name, the option can more easily be identified as its value instead.

Examples of Option Lists in fields:

Radio button:

☒ Option 1

☐ Option 2

☐ Option 3

Drop-down select:

Option 1

Option 2

Option 3

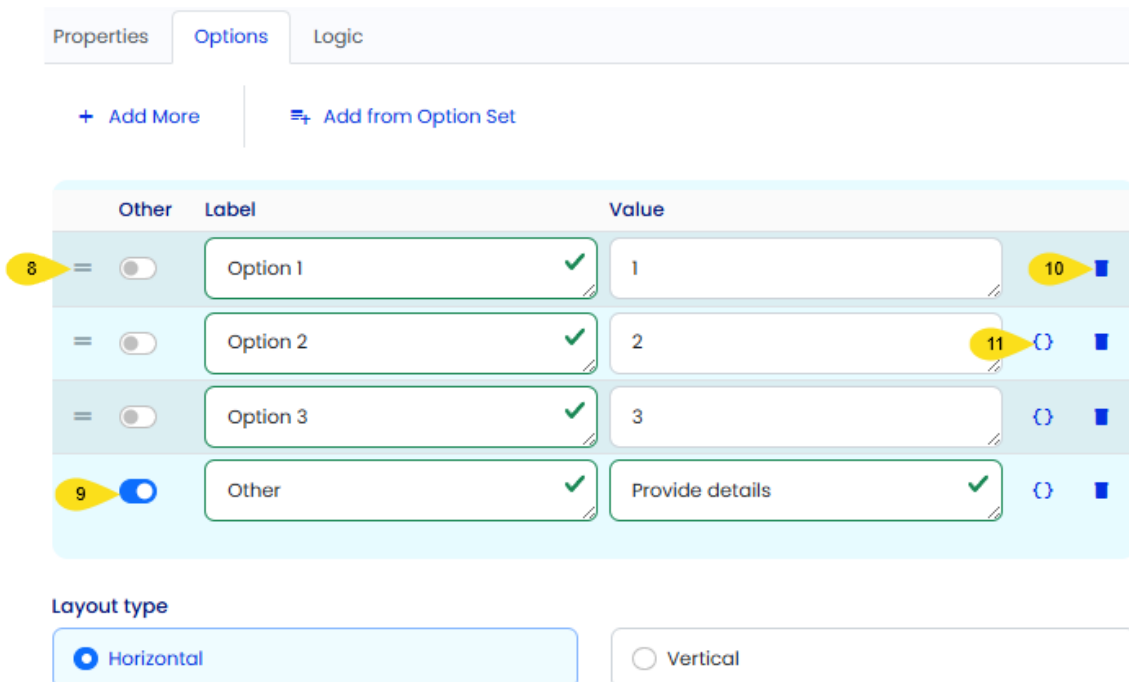
Checkbox:

☒ Option 1

☒ Option 2

☐ Option 3

There are advanced features that you can apply to an Option List and other functions available on the screen:



The screenshot shows the 'Options' tab in the Smarter Drafter interface. It features a table with columns 'Other', 'Label', and 'Value'. Below the table are 'Layout type' options: 'Horizontal' (selected) and 'Vertical'.

Other	Label	Value
<input type="checkbox"/>	Option 1	1
<input type="checkbox"/>	Option 2	2
<input type="checkbox"/>	Option 3	3
<input checked="" type="checkbox"/>	Other	Provide details

Callouts in the image:

- 8: Reorder drag bar (equals sign icon)
- 9: Other toggle slide bar (checkbox icon)
- 10: Delete rubbish bin (trash icon)
- 11: Curly logic brackets (curly braces icon)

8. **Reorder drag bar:** Click and drag an option to change its position/order. Readjust value if required.
9. **Other toggle slide bar:** Enable the slide bar to allow the form filler to enter an alternate answer.
10. **Delete rubbish bin:** Click to delete the option.
11. **Curly logic brackets:** Click to apply conditions as to when an option is to be listed.

NOTE: Applying logic to a list option is exactly the same as applying logic in other areas of Smarter Drafter. See the Apply Logic guide for detailed instructions.

3. How does the Other Toggle Slide Bar Work?

The Other toggle slide bar provides the form filler with a free-type text box to enter an alternate answer to the list of options provided. When this option is selected, the form will display another field for the form filler to complete their response.

In this example, the value for the 'other' option was adjusted to 'Provide details' to help prompt the filler:



The screenshot shows a form titled 'Make a selection:'. It has four radio button options: 'Option 1', 'Option 2', 'Option 3', and 'Other'. The 'Other' option is selected. Below the options, a text box containing the text 'Provide details' is highlighted with a yellow border.

4. Option Sets

4.1 What is an Option Set?

An Option Set is a saved Option List which allows a builder to quickly re-populate a commonly used list of options without having to manually rebuild it. Option Sets also ensure that the same list of choices is offered.

4.2 When to create an Option Set

An Option Set is useful for lists that are commonly used, e.g. days of the week, yes/no, gender, states and territories etc. If you create a custom Option List of choices that could be commonly required, that would be an opportunity to create an Option Set.

5. How to Create an Option Set

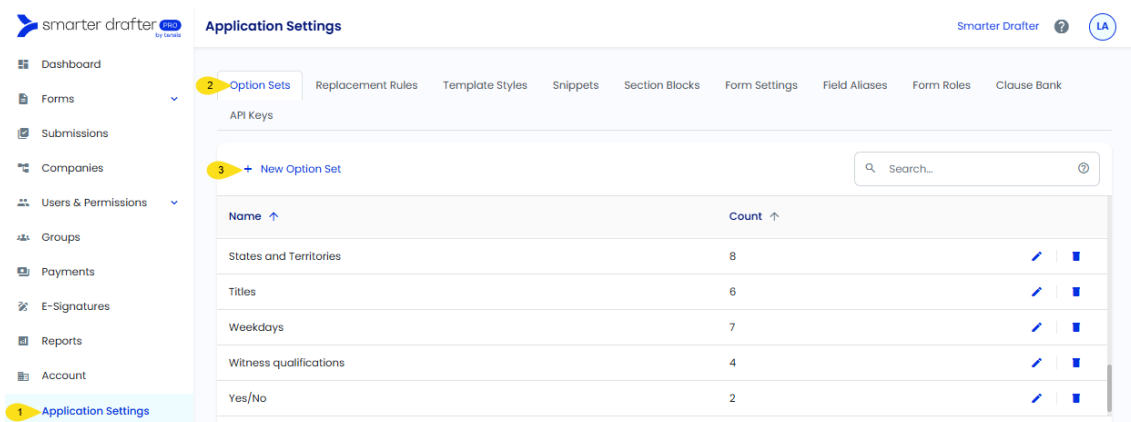
You can create an option set in two ways:

- By creating the Option Set in application settings.
- By building a list on your field and opting to save it in the field and as an Option Set.

5.1 Create an Option Set in Application Settings

To create an Option Set in Application Settings:

1. Go to **Application Settings**.
2. Click the **Option Sets** tab.
3. Click **+ New Option Set**.



The screenshot shows the 'Application Settings' page in Smarter Drafter. The left sidebar contains a navigation menu with items like Dashboard, Forms, Submissions, Companies, Users & Permissions, Groups, Payments, E-Signatures, Reports, and Account. The 'Application Settings' item is highlighted. The main content area has a tabbed interface with 'Option Sets' selected. Below the tabs, there's a section for 'API Keys' and a '+ New Option Set' button. A table lists existing option sets with columns for 'Name' and 'Count'. The table contains the following data:

Name	Count
States and Territories	8
Titles	6
Weekdays	7
Witness qualifications	4
Yes/No	2

4. Give the Option Set a **name**.
5. Click **+ New Option** and give the first option a label/name. The value will automatically be applied in numerical order.
6. Click **+ New Option** to add additional labels/options as required.
7. Click **Save**.

New Option Set

Name *

4

List of options

✓

Other	Label	Value
<div>=</div> <div> <div>6</div> <div>Option 1</div> <div>✓</div> </div>	1	<div>■</div>
<div>=</div> <div>Option 2</div> <div>✓</div>	2	<div>■</div>
<div>=</div> <div>Option 3</div> <div>✓</div>	3	<div>■</div>

5

+ New Option

Cancel

7

Save

5.1 Save a Custom List as an Option Set

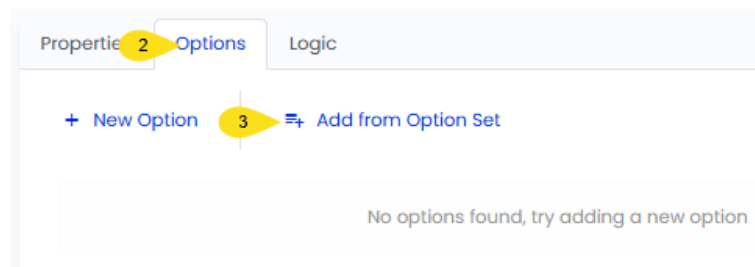
When you create a radio button, checkbox or drop-down select field and you build the custom option list, you can opt to save the list both to the field where you are creating it AND as an Option set to reuse in the future.

At the top of the list of options, there will be a button to **Save as Option Set**. Click this button and follow the steps above to create the Option Set.

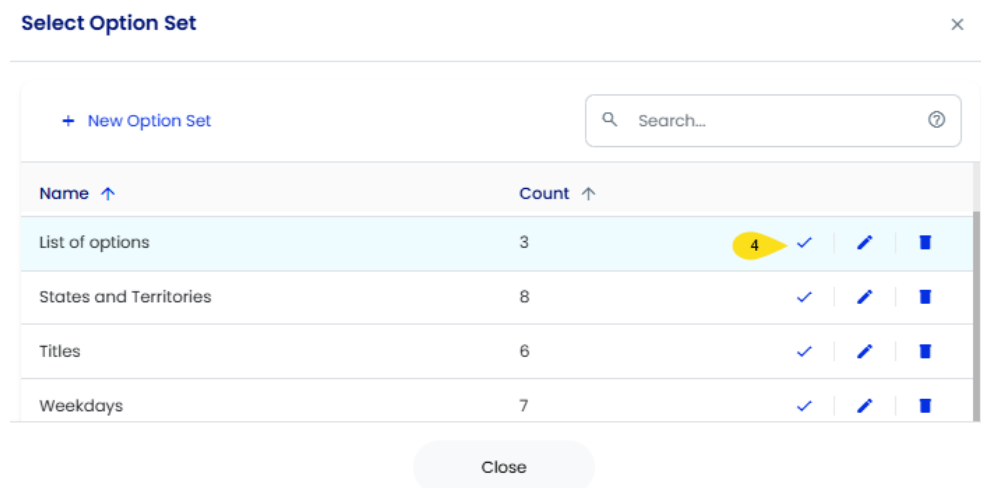
6. How to Use an Option Set in a Field

To use an Option Set in a field:

1. Create the radio button, checkbox or drop-down select field.
2. In the field properties, click the **Options** tab.
3. Click the **+ Add from Option Set** button.



4. Locate the relevant Option Set and click on the **tick** to select.



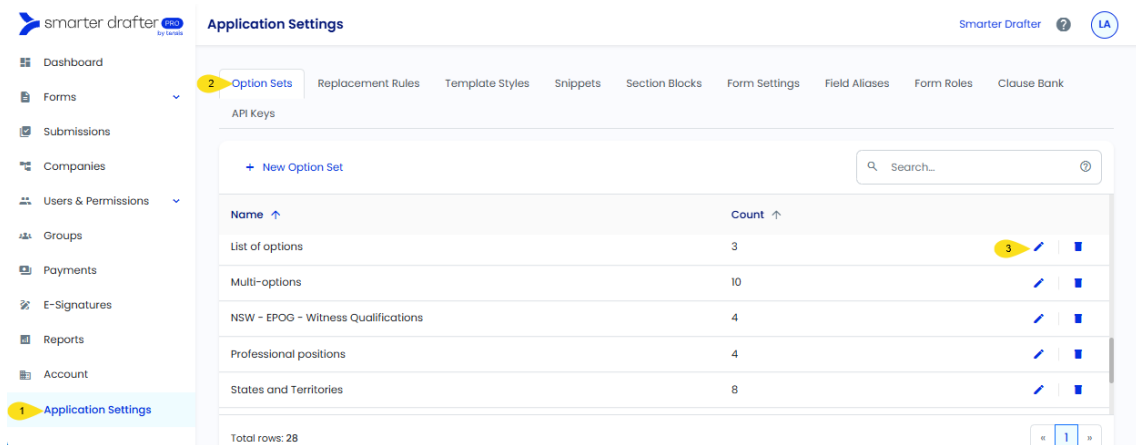
5. The options from the selection Option Set will be inserted into the field options list.

NOTE: Once the Option Set has been inserted into the list for the field, you can then make adjustments as required, e.g. add/remove options and alter settings.

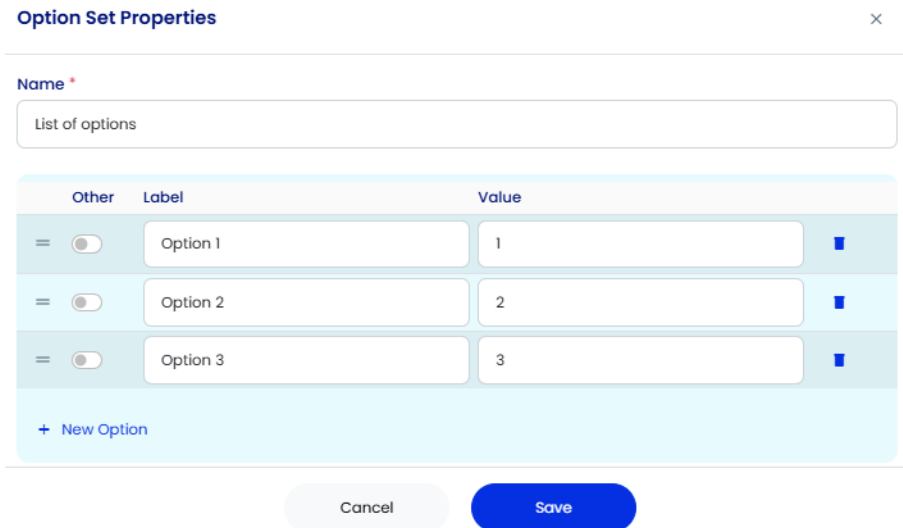
7. How to Alter an Option Set

To alter an Option Set:

1. Go to **Application Settings**.
2. Click the **Option Sets** tab.
3. Locate the relevant Option Set and click **Pencil** edit button.



4. The Option Set will open. **Edit** the list as required and click **Save**.



The 'Option Set Properties' dialog box is shown. It has a 'Name' field containing 'List of options'. Below it is a table of options:

Other	Label	Value	Actions
<input type="checkbox"/>	Option 1	1	[Pencil] [Trash]
<input type="checkbox"/>	Option 2	2	[Pencil] [Trash]
<input type="checkbox"/>	Option 3	3	[Pencil] [Trash]

At the bottom of the table is a '+ New Option' link. Below the table are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted in blue.

NOTE: When an Option Set is updated, previous fields where the Option Set was used will NOT automatically be updated.