

Create and Apply Conditional Rules

Module 11 - Conditional Rules and Replacement
Rules

Version 1.0

Table of Contents

1.	Conditional Rules.....	2
1.1	What is a Conditional Rule?.....	2
1.2	When should I use a Conditional Rule?.....	2
2.	Examples.....	3
2.1	Radio Button Fields (Yes or No).....	3
2.2	Number fields.....	6
2.3	Date fields.....	7
2.4	Address fields.....	8
2.5	Drop-down Select fields.....	8
2.6	Checkbox fields.....	9
3.	Use Conditional Rules in a Document Template.....	10
3.1	Accessing Conditional Rules in the Word Addin.....	10
3.2	Adding and Amending Conditional Rules.....	10
3.3	Applying Conditional Rules to Text.....	11
3.4	Applying Conditional Rules to Images.....	12
3.5	Content Control Settings.....	12
3.6	Applying Conditional Rules to Table Rows.....	13
3.7	Edit Conditional Rules in Word Addin.....	14
3.8	Removing an Applied Conditional Rule.....	14
3.9	Conditional Rule Options in the Word Addin.....	15
3.10	Insert Checkboxes.....	15

1. Conditional Rules

1.1 What is a Conditional Rule?

A Conditional Rule is a set of criteria.

Conditional Rules are built in the form, leveraging off the questions and options provided by the fields, and then applied in the Word template.

While logic is used to control the behaviour of the form, Word needs guidance on how to interpret the answers entered into the form and design the custom output in the document. Conditional Rules are inserted into the Word template as a content control and guide the document on what to do with the responses from the form filler.

Conditional Rules are constructed in the same way as logic. Word assesses the criteria of the Conditional Rule and compares it against the answers from the filler to determine the custom content of the template.

1.2 When should I use a Conditional Rule?

Conditional Rules should be used where:

- Text/Content is only required in specific circumstances
- Different text/content is required depending on the circumstances

Conditional Rules can be useful to change the output based on many different answer types, e.g.:

- Yes / No questions
What do you need in the document if the answer is yes vs what to do if the answer is no.
- Amounts
Text may differ if the answer is above / below a certain amount, or NIL
- Dates
Text may differ if the answer is before / after a certain date
- Address
Text may differ depending on which state applies
- Select fields (radio/checkbox/drop-down)
Text may differ depending on the answer selected

Where there are variations in a precedent, Conditional Rules are crucial in interpreting the answers from the form filler and instructing the Word template according to what is required for that particular variation.

2. Examples

NOTE: Conditional Rules can covert list fields into tick boxes (radio buttons, checkboxes and drop-down select fields). See the instructions and examples below for creating checkbox rules and the instructions for converting them to tick boxes in the template.

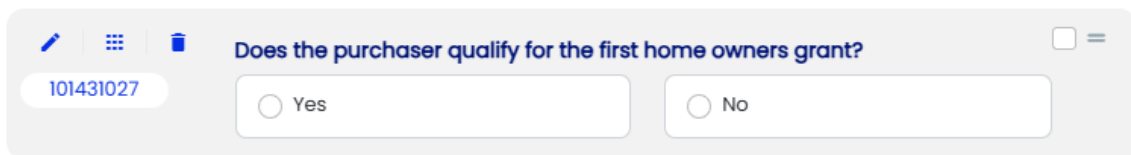
2.1 Radio Button Fields (Yes or No)

Question: Does the purchaser qualify for the first home owners grant?

Outcome: If YES – Insert text confirming that they qualify and the steps to take to apply for the grant
If NO – Insert text confirming they don't qualify

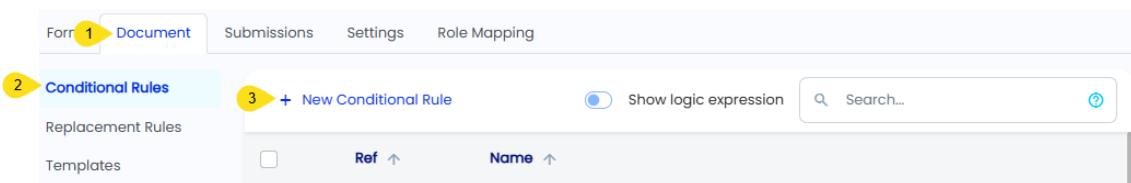
To build this Conditional Rule:

1. Create the relevant question in the form.



The screenshot shows a form field with the title "Does the purchaser qualify for the first home owners grant?". Below the title are two radio button options: "Yes" and "No". The field is identified by the ID "101431027".

2. Go to the document tab.
3. Click on Conditional Rules.
4. Click on + New Conditional Rule.



The screenshot shows the Smarter Drafter interface. The left sidebar has tabs for "Form", "Document", "Submissions", "Settings", and "Role Mapping". The "Document" tab is selected. In the "Document" tab, there are sub-tabs for "Conditional Rules", "Replacement Rules", and "Templates". The "Conditional Rules" sub-tab is selected. In the main area, there is a button labeled "+ New Conditional Rule" and a toggle switch for "Show logic expression".

The pop-up will open to create the rule.

Add New Conditional Rule
×

Name *

Type here...

▼

+ Rule
+ Rule Set

Logic Expression

▼

Notes

▼

Cancel

Save

- In the same way as building logic, create the criteria for the Conditional Rule. In this example, the Conditional Rule is going to be used to control inserting the text required where the purchaser does qualify for the grant.

Name: Give the rule a name that complies with your organisation's naming convention. In this example, the rule name is designed to describe the subject (First_Home_Owners_Grant), then the condition (Qualify) and lastly the outcome (Yes).

Click + Rule.

Add New Conditional Rule
×

Name *

1 First_Home_Owners_Grant_Qualify_Yes
✓

▼

2 + Rule
+ Rule Set

Logic Expression

▼

Notes

▼

Cancel

Save

Rule: Build the rule by selecting the relevant field and then applying the operator and response.

Click Save.

Add New Conditional Rule
×

Name *

First_Home_Owners_Grant_Qualify_Yes
✓

▼

☐ And
☐ Or
☐ Not

Does the purchaser qualify for the first home owners grant?
×
⊖ Rule

=

Yes

Logic Expression
▼

Notes
▼

Cancel
Save

6. The new Conditional Rule will be listed. Slide the toggle bar to show/hide the applied logic in the list.

Form
Document
Submissions
Settings
Role Mapping

Conditional Rules
Replacement Rules
Templates

+ New Conditional Rule

Show logic expression

Search...

Ref	Name	Logic Expression
842783	First_Home_Owners_Grant_Qualify_Yes	Does the purchaser qualify for the first home owners grant? = Yes

7. Repeat these steps to create a Conditional Rule for the alternate outcome for when the purchaser does not qualify.

TIP: Use the clone option to copy the initial field and adjust the name and criteria for the new rule.

<input type="checkbox"/>	Ref ↑	Name ↑	Logic Expression	
<input type="checkbox"/>	842783	First_Home_Owners_Grant_Qualify_Yes	Does the purchaser qualify for the first home owners grant? = Yes	Clone a Conditional Rule
<input type="checkbox"/>	842783	First_Home_Owners_Grant_Qualify_Yes	Does the purchaser qualify for the first home owners grant? = Yes	Clone a Conditional Rule
<input type="checkbox"/>	842786	First_Home_Owners_Grant_Qualify_No	Does the purchaser qualify for the first home owners grant? = No	Clone a Conditional Rule

2.2 Number fields

Question: What is the purchase price?

Outcome: Up to \$800K – Insert text confirming that the purchase price is under the threshold
Over \$800K – Insert text confirming the purchase price exceeds the threshold

Follow the steps above to create the 2 alternate rules:

<input type="checkbox"/>	Ref ↑	Name ↑	Logic Expression	
<input type="checkbox"/>	842784	Purchase_Price_Exceeds_Threshold_No	Purchase price: <= {800000}	Clone a Conditional Rule
<input type="checkbox"/>	842785	Purchase_Price_Exceeds_Threshold_Yes	Purchase price: >{800000}	Clone a Conditional Rule

2.3 Date fields

Question: Settlement date

Outcome: Falls within the current financial year – Insert text regarding current stamp duty legislation
 Falls in the next financial year – Insert text advising of new stamp duty legislation

Create a calculation field to determine whether the settlement date occurs within the current financial year. This field needs to consider both the current month and year, together with the settlement date month and year to determine whether settlement will occur within the current financial year.

Calculation expression

[Format text](#)

```

If(Today.Month > 7 and @101441191.Month > 7 and @101441191.Year = Today.Year, "Yes",
If(Today.Month > 7 and @101441191.Month < 7 and @101441191.Year = @101441209, "Yes",
If(Today.Month < 7 and @101441191.Month < 7 and @101441191.Year = Today.Year, "Yes",
If(Today.Month < 7 and @101441191.Month > 7 and @101441191.Year = @101441208, "Yes",
""))))
  
```

```

If(Today.Month > 7 and Settlement date: .Month > 7 and Settlement date: .Year = Today.Year, "Yes",
If(Today.Month > 7 and Settlement date: .Month < 7 and Settlement date: .Year = Today's date - Year - Plus
a year: , "Yes", If(Today.Month < 7 and Settlement date: .Month < 7 and Settlement date: .Year = Today.Year,
"Yes", If(Today.Month < 7 and Settlement date: .Month > 7 and Settlement date: .Year = Today's date - Year -
Minus a year: , "Yes", ""))))
  
```

Follow the steps above to create the 2 alternate Conditional Rules:

<input type="checkbox"/>	Ref ↑	Name ↑	Logic Expression			
<input type="checkbox"/>	843029	Settlement_Date_Before_1_July_Yes	Is settlement before 1 July Today's date - Year ?	is answered	Edit	Delete
<input type="checkbox"/>	843030	Settlement_Date_Before_1_July_No	Is settlement before 1 July Today's date - Year ?	is not answered	Edit	Delete

These Conditional Rules point to a question that looks at the settlement date and uses a calculation to return the word "Yes" if settlement occurs within the current financial year – which is why the YES rule shows 'if answered'. The calculation will return nothing if settlement is not within the current financial year – which is why the NO rule shows 'is not answered'.

2.4 Address fields

Question: Address of property

Outcome:

- If state = ACT – Insert ACT land tax rate
- If state = NSW – Insert NSW land tax rate
- If state = NT – Insert NT land tax rate
- If state = QLD – Insert QLD land tax rate
- If state = SA – Insert SA land tax rate
- If state = TAS – Insert TAS land tax rate
- If state = VIC – Insert VIC land tax rate
- If state = WA – Insert WA land tax rate

Follow the steps above to create the 8 alternate rules:

<input type="checkbox"/>	Ref ↑	Name ↑	Logic Expression	
<input type="checkbox"/>	843032	Property_State_ACT_Yes	Property State - ACT: is answered	✎ ⌵ 🗑
<input type="checkbox"/>	843033	Property_State_NSW_Yes	Property State - NSW: is answered	✎ ⌵ 🗑
<input type="checkbox"/>	843034	Property_State_NT_Yes	Property State - NT: is answered	✎ ⌵ 🗑
<input type="checkbox"/>	843035	Property_State_QLD_Yes	Property State - QLD: is answered	✎ ⌵ 🗑
<input type="checkbox"/>	843036	Property_State_SA_Yes	Property State - SA: is answered	✎ ⌵ 🗑
<input type="checkbox"/>	843037	Property_State_TAS_Yes	Property State - TAS: is answered	✎ ⌵ 🗑
<input type="checkbox"/>	843038	Property_State_VIC_Yes	Property State - VIC: is answered	✎ ⌵ 🗑
<input type="checkbox"/>	843039	Property_State_WA_Yes	Property State - WA: is answered	✎ ⌵ 🗑

2.5 Drop-down Select fields

Question: Settlement timetable

Outcome:

- Urgent – Insert text to request to shorten the settlement date
- On time – Confirm settlement to proceed as per the contract
- Delayed – Insert text requesting an extension of the settlement date

Follow the steps above to create the 3 alternate rules:

<input type="checkbox"/>	Ref ↑	Name ↑	Logic Expression	
<input type="checkbox"/>	842787	Settlement_Timetable_Urgent_Yes	Settlement timetable: = Urgent - Request short settlement	✎ ⌵ 🗑
<input type="checkbox"/>	842788	Settlement_Timetable_On_Time_Yes	Settlement timetable: = On time	✎ ⌵ 🗑
<input type="checkbox"/>	842789	Settlement_Timetable_Delayed_Yes	Settlement timetable: = Delayed - Request extension	✎ ⌵ 🗑













2.6 Checkbox fields

Question: Inclusions

Outcome: Insert ticked/unticked boxes in contract for:
Blinds | Dishwasher | Rangehood | Stove | Other

Follow the steps above to create the 5 alternate rules:

NOTE: Checkbox fields are multi-select so the operator generally used is CONTAINS rather than EQUALS.

<input type="checkbox"/>	Ref ↑	Name ↑	Logic Expression	
<input type="checkbox"/>	842790	Inclusions_Blinds_Yes	Inclusions contains Blinds	  
<input type="checkbox"/>	842791	Inclusions_Dishwasher_Yes	Inclusions contains Dishwasher	  
<input type="checkbox"/>	842792	Inclusions_Rangehood_Yes	Inclusions contains Rangehood	  
<input type="checkbox"/>	842793	Inclusions_Stove_Yes	Inclusions contains Stove	  
<input type="checkbox"/>	842794	Inclusions_Other_Yes	Inclusions contains Other	  

Conditional Rules can perform various functions and depending on your requirements, the operator used will differ. Checkbox options allow you to condition:

1. Each individual option
Operator used: contains
2. A specific option
Operator used: equals
3. A specific exclusion
Operator used: does not contain
4. A combination of included or excluded options
Build required and/or rule sets for the conditions

Checkbox options can appear in the document as:

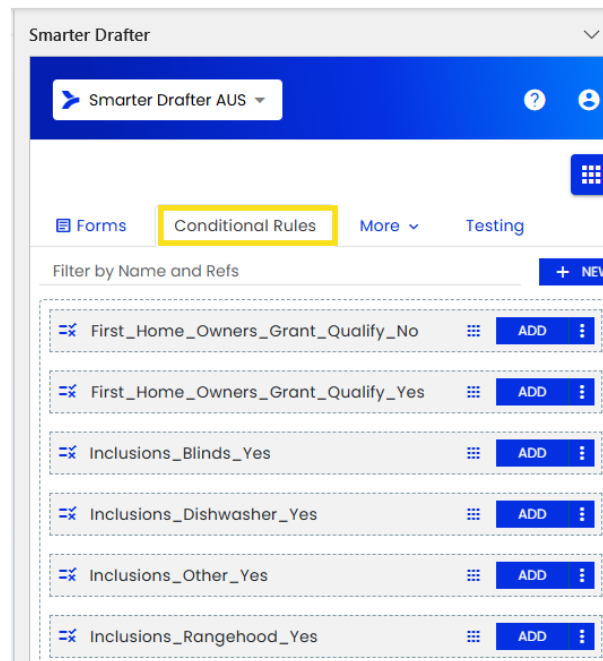
1. The text of the option/s selected
>> this will appear in sentence case with the required commas and use the separator word 'and'.
2. Alternative text based on the option/s selected.
3. A ticked box for each option selected, and an empty box for each option that was not selected.

Multiple rules can be used to produce outcomes for every option in the checklist to cater for the multi-select functionality of checkbox fields.

3. Use Conditional Rules in a Document Template

3.1 Accessing Conditional Rules in the Word Addin

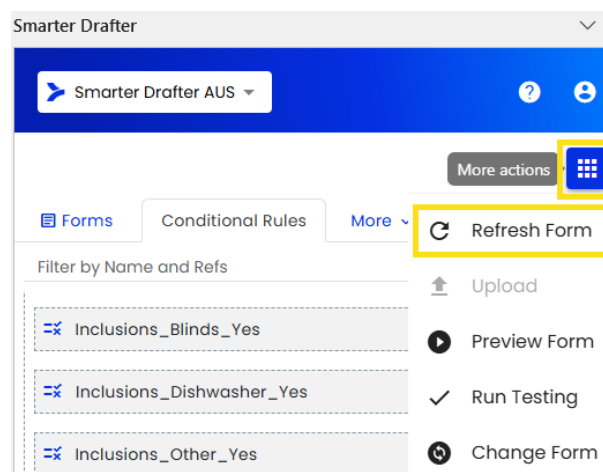
When you are working in your template, you will be able to access the Conditional Rules that you have created on the form via the Word Addin, under the Conditional Rules tab.



3.2 Adding and Amending Conditional Rules

When you create new rules and/or make changes to existing rules in the form, you will need to refresh the Word Addin to transfer the updates made in the form over to the template.

On the Word Addin, click on the **Waffle** options button and click **Refresh** to update the Conditional Rules.



3.3 Applying Conditional Rules to Text

Conditional Rules are applied to variable/optional content of the Word template to control when that content will or won't appear.

The instructions in 2.1 above use the question about whether the purchaser qualifies for the First Home Owners Grant as the basis to create 2 Conditional Rules to handle the **Yes** or **No** options. These rules can be used to insert the relevant text for each alternative, e.g. "qualifies" or "does not qualify":

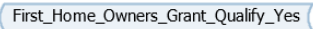

We confirm that your purchase ~~qualifies~~ ~~does not qualify~~ for the First Home Owners Grant.¶

To apply a Conditional Rule to the YES option:

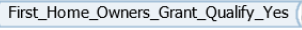
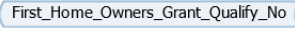

1. Highlight the variable text.
2. Locate the relevant Conditional Rule in the Word Addin.
3. Click Add.

We confirm that your purchase **1** ~~qualifies~~ for the First Home Owners Grant.¶ **2**  First_Home_Owners_Grant_Qualify_Yes **3** **ADD** 

The Conditional Rule will appear as a blue content control, wrapped around the relevant text

We confirm that your purchase  ~~First_Home_Owners_Grant_Qualify_Yes~~ **qualifies**  for the First Home Owners Grant.¶

Repeat these steps to apply the alternate Conditional Rule for the NO option:

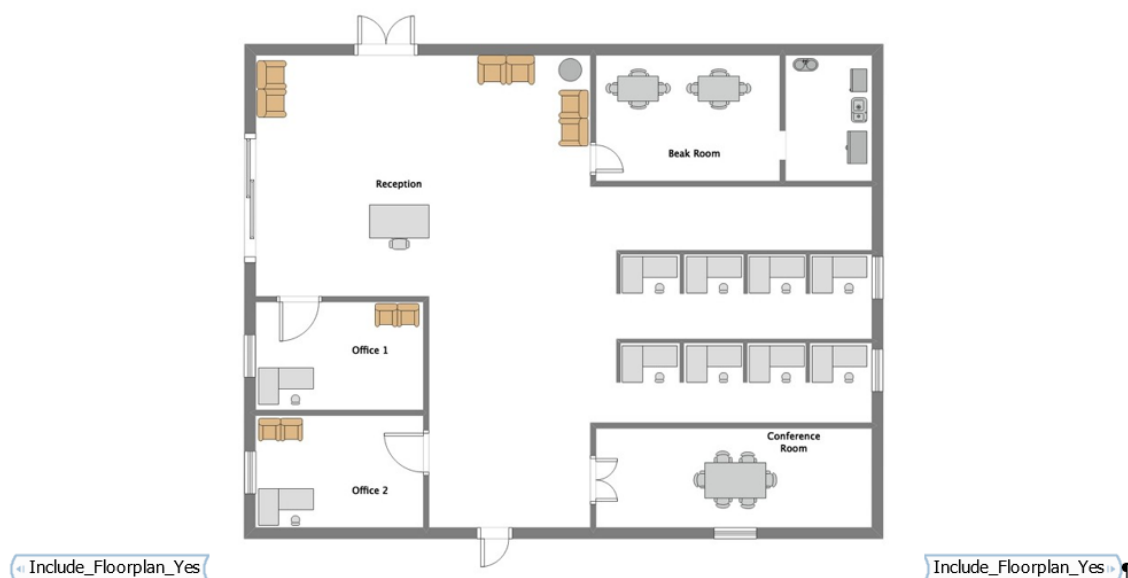
We confirm that your purchase  ~~First_Home_Owners_Grant_Qualify_Yes~~ **qualifies**  ~~First_Home_Owners_Grant_Qualify_No~~ **does not qualify**  for the First Home Owners Grant.¶

Conditional Rules can be applied to any length or type of text, eg multiple paragraphs, numbered or bulleted lists etc.

NOTE: The same Conditional Rule can be used throughout the template where the same criteria applies.

3.4 Applying Conditional Rules to Images

Conditional Rules are applied to images in the same way as text. Simply highlight the image and then apply the Conditional Rule.



NOTE: Always highlight the relevant text/image and then apply the Conditional Rule.
Never insert the rule first and type/paste content between the brackets.

3.5 Content Control Settings

A Conditional Rule is applied as a content control and relies on the format of the content control brackets to determine the paragraph/table formatting.

Like an ordinary field, outlined brackets include the paragraph formatting and so will automatically remove the paragraph return or table cell where the Conditional Rule is not met. Alternatively, solid brackets will retain the paragraph return or table cell regardless of whether the Conditional Rule is met.

In this example, the text is designed as a single sentence and the Conditional Rules are in solid brackets as the paragraph formatting is not to be adjusted by the behaviour of the rules.

Each Conditional Rule will insert the number for the percentage of the applicable state's tax rate.

The land tax rate for **State** **[*]** is **Property_State_ACT_Yes** **1** **Property_State_NSW_Yes** **2**
Property_State_NT_Yes **3** **Property_State_QLD_Yes** **4** **Property_State_SA_Yes** **5** ,
Property_State_TAS_Yes **6** **Property_State_VIC_Yes** **7** **Property_State_WA_Yes** **8** %.

Only the Conditional Rule for the relevant state will ever be met, so only one number will appear in the generated document and the sentence will be completed correctly, e.g.:

The land tax rate for ACT is 1%.
The land tax rate for NSW is 2%.
etc

In the next example, each state has been handled in its own independent sentence. With this set-up, outline brackets are required so that the paragraph returns are included in the Conditional Rule and when the document is generated, empty returns won't be left behind for the rules that are not met.

« Property_State_ACT_Yes » The land tax rate for ACT is 1%. « Property_State_ACT_Yes » ¶
« Property_State_NSW_Yes » The land tax rate for NSW is 2%. « Property_State_NSW_Yes » ¶
« Property_State_NT_Yes » The land tax rate for NT is 3%. « Property_State_NT_Yes » ¶
« Property_State_QLD_Yes » The land tax rate for QLD is 4%. « Property_State_QLD_Yes » ¶
« Property_State_SA_Yes » The land tax rate for SA is 5%. « Property_State_SA_Yes » ¶
« Property_State_TAS_Yes » The land tax rate for TAS is 6%. « Property_State_TAS_Yes » ¶
« Property_State_VIC_Yes » The land tax rate for VIC is 7%. « Property_State_VIC_Yes » ¶
« Property_State_WA_Yes » The land tax rate for WA is 8%. « Property_State_WA_Yes » ¶

3.6 Applying Conditional Rules to Table Rows

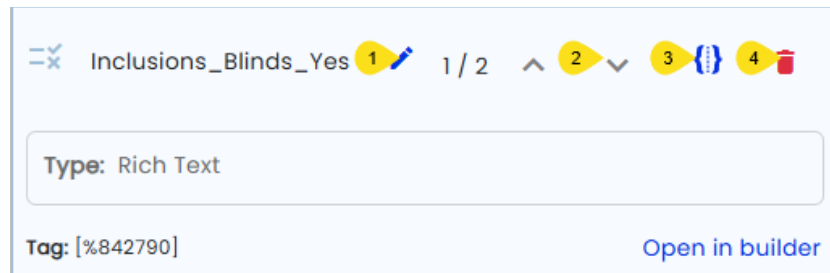
Conditional Rules are applied to table rows in the same way as text. The only caution here is to ensure that you highlight the entire row (including the table row marker) and then apply the Conditional Rule.

Stove»	Kitchen»	<insert-details>»
--------	----------	-------------------

Inclusion»	Location»	Condition»
« Inclusions_Blinds_Yes » Blinds»	All windows»	<insert-details> « Inclusions_Blinds_Yes » »
« Inclusions_Dishwasher_Yes » Dishwasher»	Kitchen»	<insert-details> « Inclusions_Dishwasher_Yes » »
« Inclusions_Rangehood_Yes » Rangehood»	Kitchen»	<insert-details> « Inclusions_Rangehood_Yes » »
« Inclusions_Stove_Yes » Stove»	Kitchen»	<insert-details> « Inclusions_Stove_Yes » »

3.7 Edit Conditional Rules in Word Addin

Once a Conditional Rule has been applied, the settings can be adjusted in the Word Addin. To adjust the settings, click on the relevant rule within the template and the settings will appear in the Word Addin where you can make adjustments:



Pencil: Edit the rule criteria

Arrows: Navigate to each instance the rule has been used

Logic: Preview the criteria

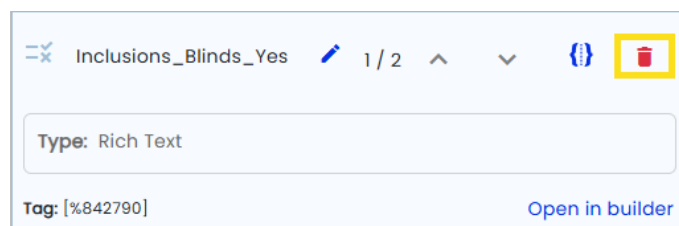
Bin: Remove the rule from where it was inserted in the Word template

NOTE: While the edit option is available in the Word Addin, it is recommended that all adjustments to Conditional Rules be handled within the form itself.

3.8 Removing an Applied Conditional Rule

To remove a Conditional Rule that has been applied, click on the rule within the document.

The settings will open in the Word Addin – click on the **Bin**.



You will need to confirm the removal of the Conditional Rule and whether you want the contents within the rule to also be deleted. If you want the contents to be deleted, tick the checkbox. Click **Remove**.

Please Confirm

×

Are you sure you want to remove this content control?

☐ Delete the content when removing the content control

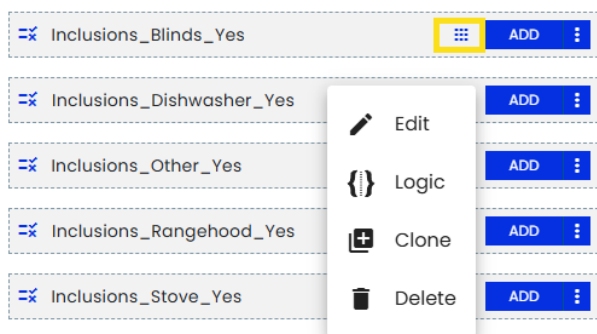
Remove

Cancel

If you don't tick the checkbox, the rule will be deleted but the contents will remain.

3.9 Conditional Rule Options in the Word Addin

The waffle button next to each Conditional Rule will provide a list of options.



The screenshot shows a list of conditional rules in the Word Addin. The rules are: Inclusions_Blinds_Yes, Inclusions_Dishwasher_Yes, Inclusions_Other_Yes, Inclusions_Rangehood_Yes, and Inclusions_Stove_Yes. Each rule has a waffle button (a 3x3 grid icon) and an 'ADD' button. The waffle menu for the first rule is open, showing options: Edit (pencil icon), Logic (bracket icon), Clone (plus icon), and Delete (trash icon).

Edit: Alter the criteria of the rule

Logic: Reveal the criteria of the rule

Clone: Create a new rule with the same criteria

Delete: Delete the rule

Changes made via the Word Addin will automatically transfer to the form. If you can't see the changes in the form, refresh the webpage.

NOTE: While these options are available in the Word Addin, it is recommended that all adjustments to Conditional Rules be handled within the form itself.

3.10 Insert Checkboxes

Conditional Rules can be used to insert a ticked or unticked checkbox depending on whether or not the criteria of the rule is met. By inserting the Conditional Rule into the template as a checkbox, the intention is that a checkbox is required to appear and the criteria of the rule will determine whether it is ticked or unticked.

To access the checkbox option, click on the Conditional Rule's **kebab** menu and tick the **As Checkbox** option.



Content Control Settings

As Checkbox ☐

+ Add **X Close**

This will open the checkbox settings where you can choose whether you want the checkbox mark to appear as a tick or a cross.

Content Control Settings

Replace Selected Conditional Rule ☐

As Checkbox ☒

Symbol: ☐ ☐ ☒ ☐

+ Add **X Close**

Make your selection and click **Add** to insert the checkbox.

In this example, checkboxes have been used for the list of inclusions. When the document is generated, the Conditional Rules will be interpreted and each of the boxes for the items selected as inclusions will appear ticked.

☒ Inclusions_Blinds_Yes Blinds



☒ Inclusions_Dishwasher_Yes Dishwasher


☒ Inclusions_Rangehood_Yes Rangehood


☒ Inclusions_Stove_Yes Stove

☐ Inclusions_Other_Yes Other

Once a checkbox field has been inserted, the settings can be adjusted in the Word Addin. To adjust the settings, click on the relevant checkbox within the template and the settings will appear in the Word Addin where you can make adjustments.

 Inclusions_Blinds_Yes 

Type: Checkbox Style: 

Tag: [%842790]/checkbox/1 [Open in builder](#)