

Parent and Child Forms

Module 18 – Parent and Child Forms

Version 1.0

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1. What are Parent and Child Forms?

Parent forms allow you to build comprehensive forms that have many similarities to the requirements of other forms. Rather than creating separate independent forms and rebuilding those similarities, a child form allows you to leverage off the parent form and exclude the parts that aren't required.

2. The Parent and Child Form Relationship

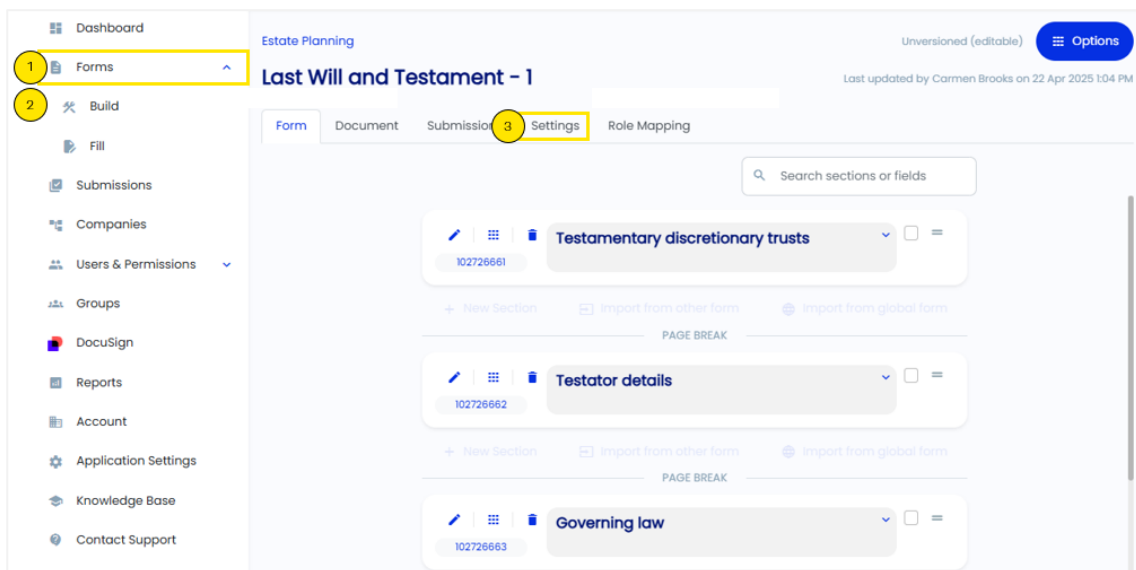
Any form can be used as a parent form and can have unlimited related child forms. When a child form has been created, it has an ongoing relationship with the parent form – when the parent form is updated, the child form also takes on the changes (see below for exceptions). This guide will demonstrate how to create a child form and how the relationship between the parent/child forms works.

3. Create a Child Form

3.1 Open the Parent Form

When you have identified a form that you would like to use as the parent form and create a child form, open the parent form in the form builder.

1. Click **Forms**.
2. Click **Build**. Open the relevant parent form.
3. Click **Settings**.

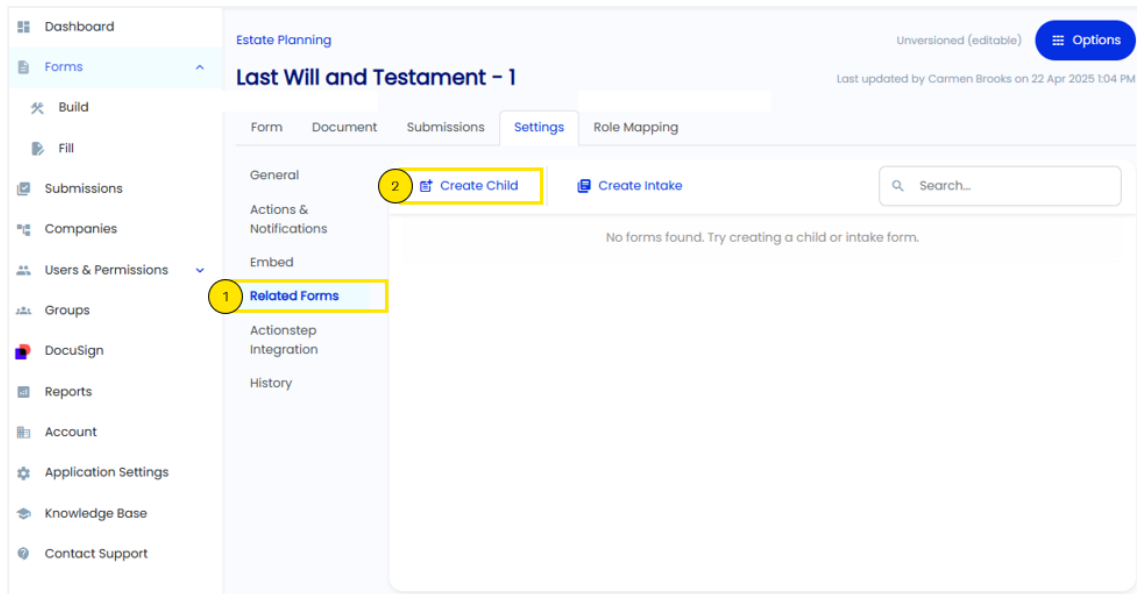


The screenshot displays the Smarter Drafter form builder interface. On the left sidebar, the 'Forms' menu item is highlighted with a yellow box and a yellow circle containing the number 1. Below it, the 'Build' menu item is also highlighted with a yellow box and a yellow circle containing the number 2. The main content area shows the 'Last Will and Testament - 1' form, which is currently in the 'Settings' tab, indicated by a yellow box and a yellow circle containing the number 3. The form is titled 'Estate Planning' and is 'Unversioned (editable)'. It contains three sections: 'Testamentary discretionary trusts', 'Testator details', and 'Governing law'. Each section has a 'New Section' button, an 'Import from other form' button, and an 'Import from global form' button. The 'Testamentary discretionary trusts' section has a unique identifier of 102726661. The 'Testator details' section has a unique identifier of 102726662. The 'Governing law' section has a unique identifier of 102726663. The 'Settings' tab is also highlighted with a yellow box and a yellow circle containing the number 3.

3.2 Create the Child Form

In the settings tab, a new child form can be created.

1. Click **Related Forms**.
2. Click **Create Child**.



A pop up will open where the **new child form** can be named, and a **folder** can be selected to save the child form. The child form does not need to live in the same folder as the parent form. Click **Save**.

Add New Child Form

Form name *

Last Will and Testament - Short version

Form Alias * ⓘ

last_will_and_testament_short_version

Copy

Folder *

Estate Planning

Cancel

Save

The child form will open in the **form builder**.

4. Editing a Child Form

4.1 What Edits can be made to a Child Form?

Editing a child form is limited to:

1. Changing the label of a section.
2. Changing the label of a field.
3. Hiding whole sections.
4. Setting individual fields to 'hidden'.
5. Changing mandatory/optional/read only settings.
6. Setting or changing a default value.
7. Adding supporting text.

IMPORTANT NOTES

- If any element of a question has been changed in the child form, that question disconnects from future changes made to that specific question in the parent form. This relates to every question and every type of change.
- Changes are not apparent in the child form so when changes are published in the parent form, a builder should check the child form as the updates from the parent form may not have transferred. That may be the required outcome, but it's important to check where it's a change that is required in the child form as well.
- Before changes are made to a child form, possible impact on logic and conditional rules should be carefully considered and checked.

-
8. Changing the label of a section.
 9. Changing the label of a field.
 10. Hiding whole sections.
 11. Setting individual fields to 'hidden'.
 12. Changing mandatory/optional/read only setting.
 13. Setting or changing a default value.
 14. Add supporting text.

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 - Before changes are made to a child form, possible impact on logic and named ranges should be carefully considered and checked.
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4.2 Hide All Slide Switch

A child form will have a **Hide All** slide switch on the section banner. Click the switch to toggle hide all on/off.

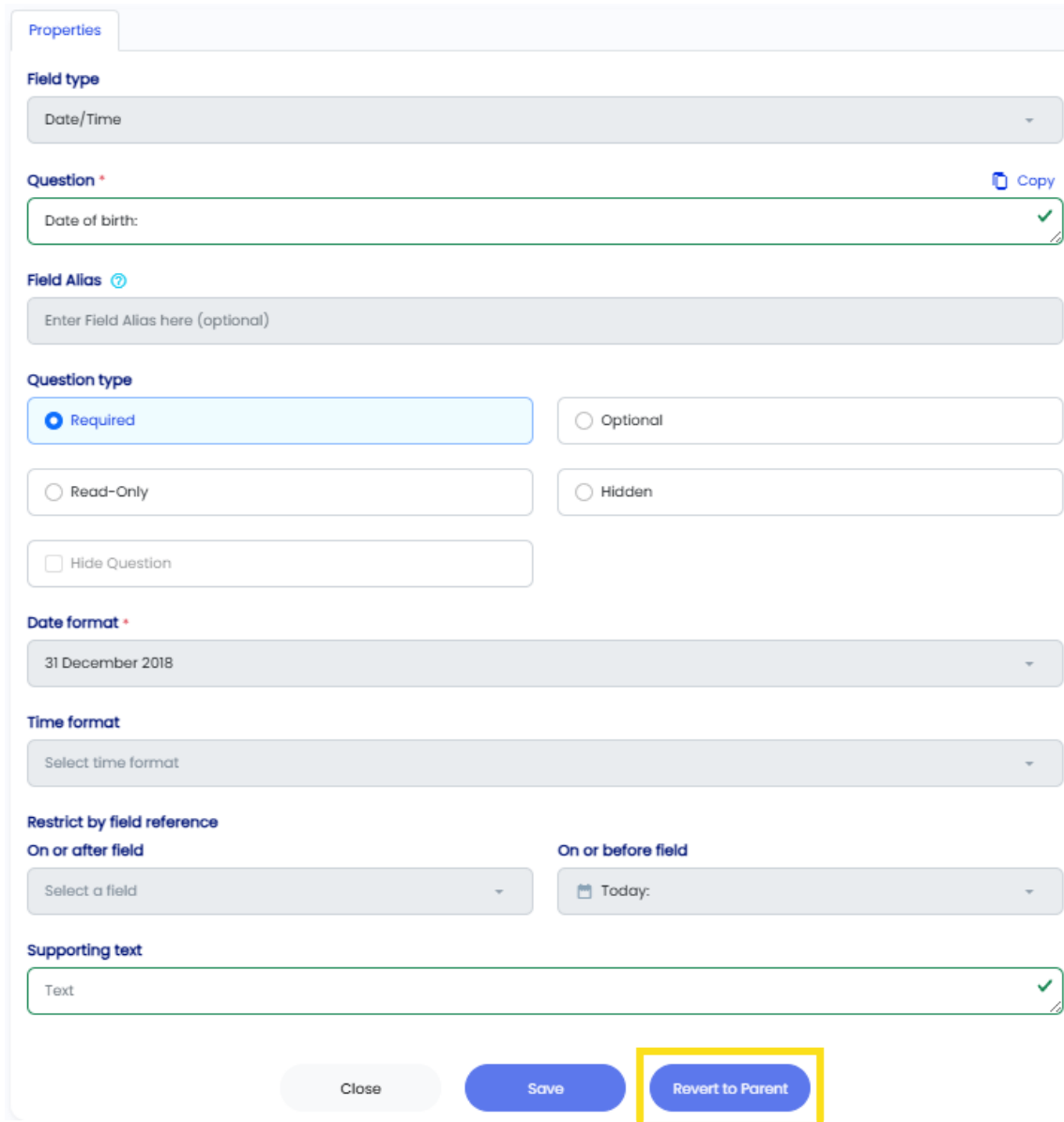
This feature will hide the whole section when the child form is generated.



4.3 Undo Edits

If edits have been made to the child form that need to be undone, there is a Revert to Parent option. This option is available for changes made to an individual field or a whole section.

Field:



Properties

Field type
Date/Time

Question * [Copy](#)
Date of birth: ✓

Field Alias [?](#)
Enter Field Alias here (optional)

Question type
☒ Required ☐ Optional
☐ Read-Only ☐ Hidden
☐ Hide Question

Date format *
31 December 2018

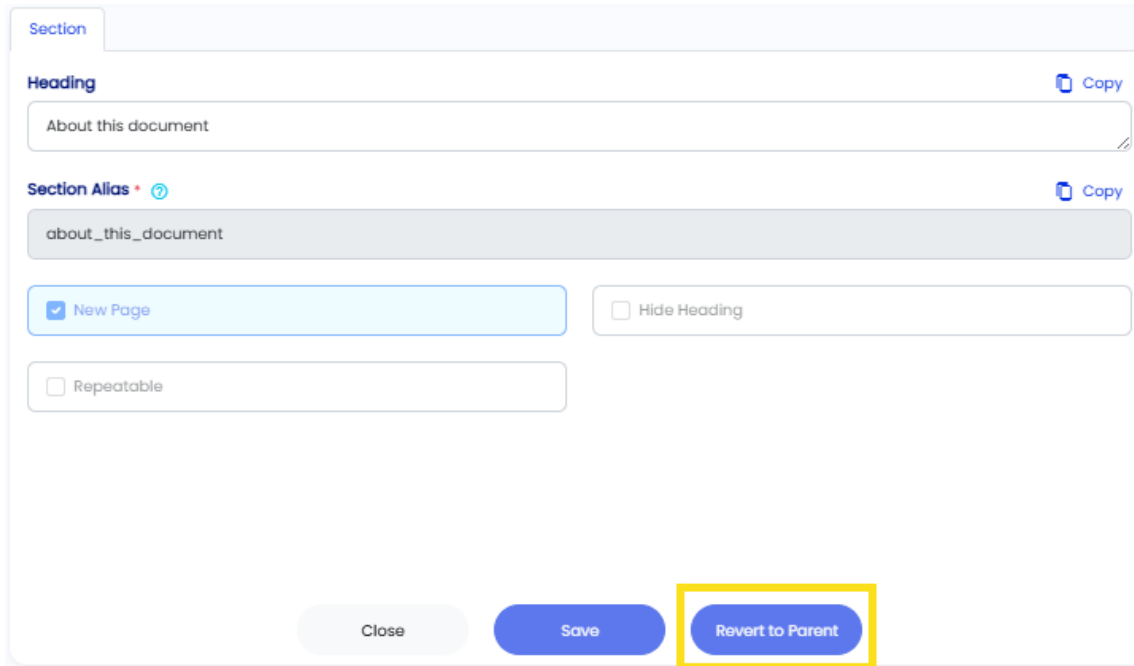
Time format
Select time format

Restrict by field reference
On or after field **On or before field**
Select a field Today:

Supporting text
Text ✓

Close Save **Revert to Parent**

Section:



5. Editing the Parent Form








5.1 How do Edits Transfer to Child Forms?

Edits to a parent form will be replicated in all related child forms **EXCEPT if the impacted fields have been altered in the child form**. When a parent form is published, the edits are transferred to the child forms. While a parent form is in draft, the child forms won't be changed.

6. Re-Opening a Child Form

Child forms can be opened from the parent form by navigating to related forms (see 3.1 and 3.2 above).

Child forms will be listed in the builder forms library and can be clearly identified by the Child Form label. The child form can be opened here by clicking on the document name link.

 New Form	 Import HubSpot Form	 New Folder	<input type="text" value="Search..."/>
 Test doc - Child form for testing	Child form	24 Feb 2025 11:01 AM	
 Test doc - Child form testing	Child form	23 Apr 2025 11:04 AM	

7. Generating a Child Form

Child forms appear in the form filler's library like ordinary forms and are generated in the same way.