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Create Replacement Rules

Module 11 - Conditional Rules and Replacement Rules

Version 1.0

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1.   Replacement Rules

1.1   What is a Replacement Rule?

Replacement Rules are a 'find and replace' feature that runs silently during document generation. They are designed to correct data before it is entered into the document and/or make adjustments based on criteria using conditions/logic.

There are two types of Replacement Rules:

- **Universal**: Will run on every generated document by default, can be adjusted on an individual form
  >> commonly used to fix typos (e.g. two full stops)
  >> can apply preferred text formatting (e.g. Vic or VIC)
- **Form**: Will run on the documents connected to a specific form only
  >> commonly used to make adjustments based on criteria (e.g. for Bank A use the term 'loan agreement' but for Bank B use the term 'credit contract')
  >> allows the same form and template to be used for multiple purposes

1.2   When to use Replacement Rules

Universal level Replacement Rules can be used to correct common typos and formatting preferences. It isn't mandatory to use Replacement Rules so don't create any superfluous rules that may hinder rather than help.

NOTE: Builders should consider the universal Replacement Rules when creating new forms to determine if any of the universal Replacement Rules should be excluded from running on a particular document.

Form level Replacement Rules can be used to make alterations in the generated text based on set criteria and only on the documents generated by a specific form. Conditional Rules and calculations may be able to achieve the same outcome as a Replacement Rule and are usually the preferred options to use, but a Replacement Rule may be the better option in certain circumstances.


NOTE: If there are unexpected text adjustments occurring in generated documents, builders should check universal and form Replacement Rules as part of the trouble-shooting process in case this is the cause.

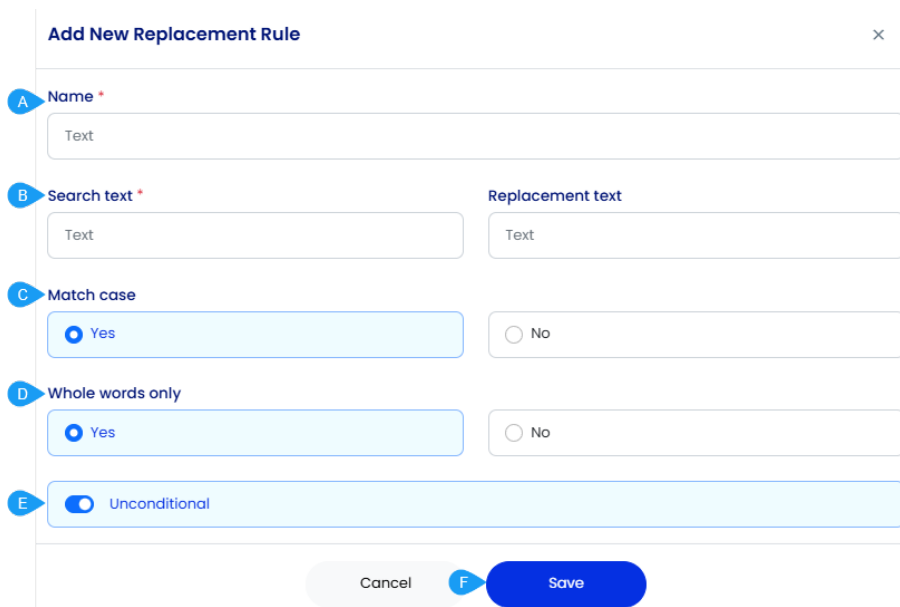## 2.   Create a Replacement Rule

2.1   Create a Universal Replacement Rule

To create a universal Replacement Rule:

1. Click **Application Settings** in the navigation menu.
2. Click **Replacement Rules**.
3. Click **New Replacement Rule**.
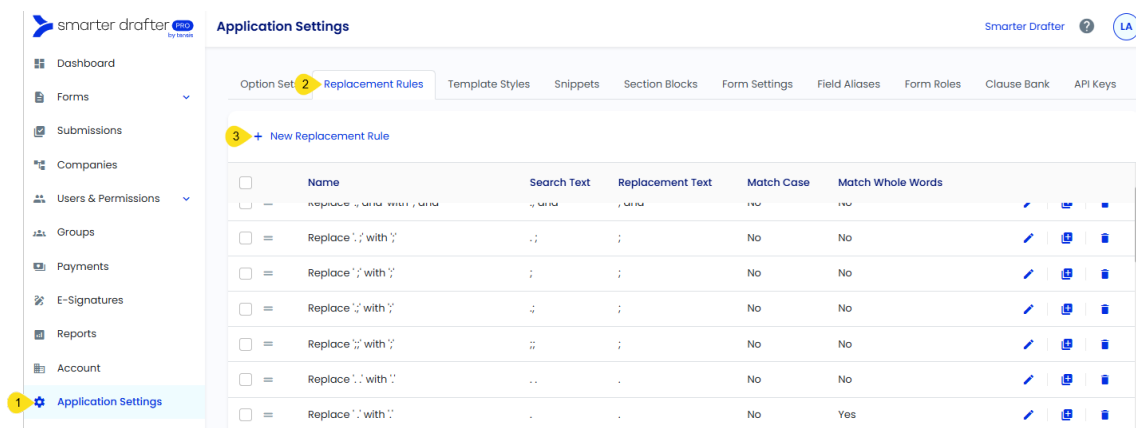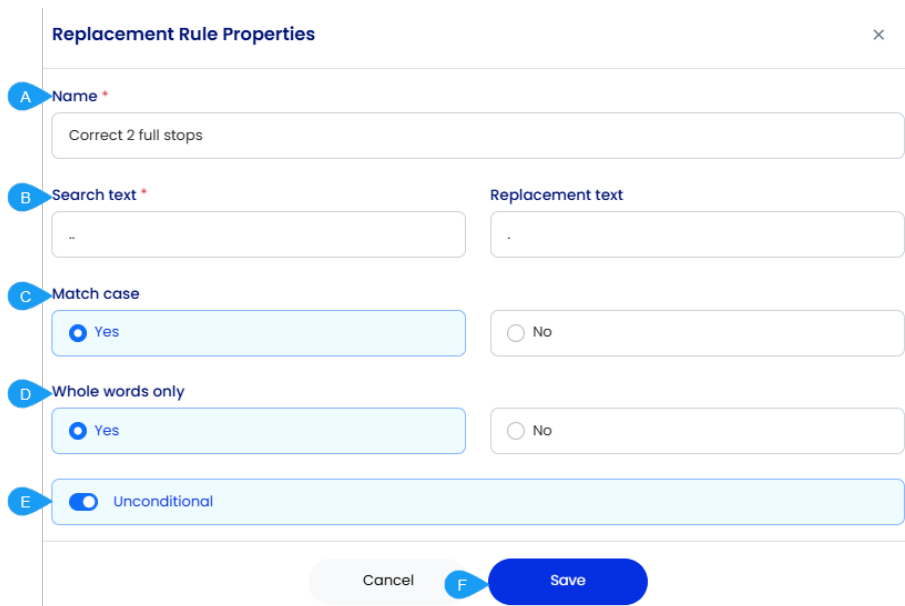

The new Replacement Rule pop-up will open:

When writing a replacement rule, consider the following:

A. The **name**. Set a name that is descriptive of what the Replacement Rule does.

B. The **Search Text** and **Replacement Text**. The Replacement Rule works like "find and replace" in Word. The sequence in the **Search Text** field will be replaced by the **Replacement Text**.

C. There is an option to **Match Case**. If you select "No", the case of letters will be ignored and the replacement will occur regardless of case.

D. **Whole Words Only** is generally set to "Yes".

E. The **Unconditional** setting means the replacement will occur every time. By setting this to conditional, it allows you to apply conditions/logic so that the Replacement Rule will only run in certain circumstances. For example, one client may require documents to be produced in a unique way, but eight other clients require them in a uniform way. You can create a replacement rule for the one client with unique needs.

F. When all fields are complete, click **Save**.

Replacement Rule Properties ×

A → Name *
Correct 2 full stops

B → Search text *   Replacement text
..   .

C → Match case
● Yes   ○ No

D → Whole words only
● Yes   ○ No

E → ⬤ Unconditional
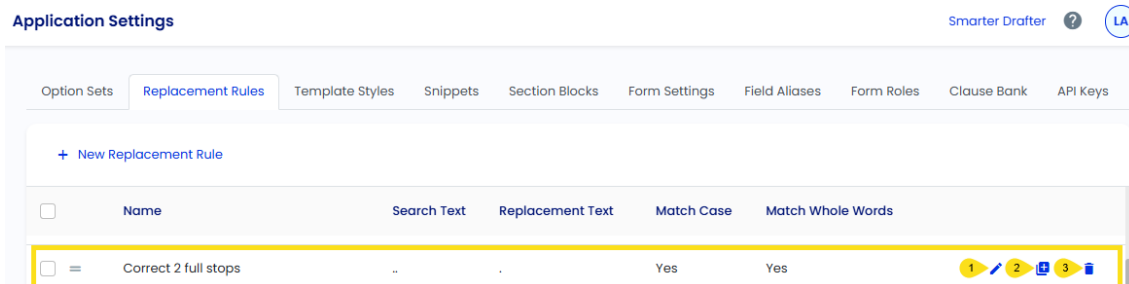
Cancel   F Save

In the example above, a Replacement Rule has been created to correct a common punctuation error – replace 2 full stops with one.

The new Replacement Rule will appear in the list and you will have options to:

1. **Edit**: Click the pencil button to open the settings and make changes.
2. **Clone**: Click the + button to create a copy and make a new Replacement Rule.

3. **Bin**: Click the rubbish bin to delete the Replacement Rule.

NOTE: Universal Replacement Rules are powerful, in that they are run automatically and silently during document generation. Your organisation should have guidelines and controls regarding who can add universal Replacement Rules to your account and be responsible for considering any implications.

2.2   Create a Form Replacement Rule

To create a form Replacement Rule:

1. On the draft version of the form, click **Document**.
2. Click **Replacement Rules**.
3. Click **New Replacement Rule**.

4. Complete the Replacement Rule properties as per the Universal Replacement Rule instructions above.

NOTE: Universal Replacement Rules are automatically inherited by all forms and will appear in the list of Replacement Rules on each form. When a form level Replacement Rule is created, it will then appear amongst this list on the individual form only.

In the example below, a condition has been applied to only implement this Replacement Rule where the filler has selected Bank B when completing the questionnaire.

Where the filler selects Bank B, the Replacement Rule will run a 'find and replace' to look for the term 'Loan Agreement' and replace it with 'Credit Contract'.
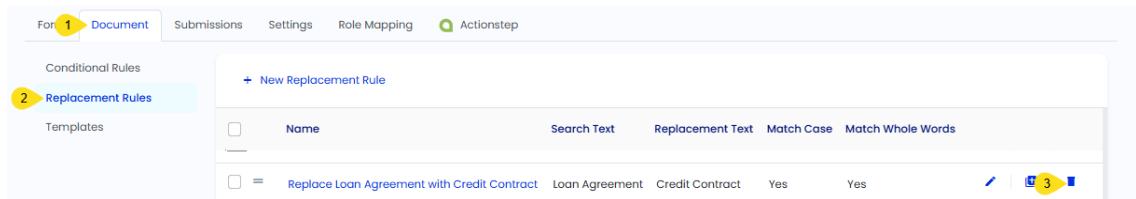
When the document is generated, the replacement will have been made.

NOTE: Consider the restriction of applying 'whole words only'. The example above has disabled this setting so that plurals will also be found and replaced.

3. Exclude Universal Replacement Rules

3.1 Remove a Universal Replacement Rule from a Form

A Replacement Rule can be excluded from an individual form. On the form, navigate to the list of Replacement Rules and delete the specific rule by clicking on the rubbish bin.