



Create a Simple Content Block

Module 7 – Reusable Content

Version 1.0

Table of Contents

1.	Content Blocks.....	3
1.1	What is a Content Block?.....	3
1.2	Why use Content Blocks?.....	3
1.3	When to use a Content Block.....	3
2.	Content Blocks and Section Blocks.....	4
2.1	Why does a Content Block Need to be Connected to a Section Block?.....	4
3.	Getting Started.....	5
3.1	Prepare the Content Block Word Document.....	5
3.2	Static Content Blocks.....	5
3.3	Dynamic Content Blocks.....	5
4.	Automate the Content Block.....	6
4.1	Add Fields and Automation to the Content Block.....	6
4.2	Updating the Word Add-In with Changes to the Content Block.....	7
4.3	Upload the Content Block to the Section Block.....	7
5.	Test and Publish the Section Block.....	9
5.1	Testing.....	9
5.2	Publishing.....	9
6.	Amending Content Blocks.....	10
7.	Using Content Blocks in Templates.....	10
7.1	Inserting Content Blocks into the Template.....	10
7.2	Test the Template.....	11
7.3	Section Blocks With or Without Content Blocks.....	11
8.	Building Blocks.....	12

8.1	Summary of Steps:.....	12
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1. Content Blocks

1.1 What is a Content Block?

A Content Block is a portion of a Word document that can be reused within multiple templates. The Word document can be static or automated, brief or extensive, and can utilise the usual features of Word.

1.2 Why use Content Blocks?

The key benefit of a Content Block is that it can be reused multiple times but is maintained in a single core version. This is useful where the same text is required in many documents and provides certainty that the formatting and content is accurate and consistent, facilitating faster review and approval processes. They also help maintain a standard quality for all documents.

1.3 When to use a Content Block

You will be able to identify useful content for a Content Block when you notice the same text and layout in multiple documents. Some examples include:

- **Branding:** Create standardised logo/image files to ensure the correct size and quality files are used.
- **Correspondence:** Create a letter shell to set a consistent layout for all correspondence.
- **Coversheets:** Create a coversheet shell to set a consistent layout for all cover/title pages.
- **Court forms:** Create separate Content Blocks to build the various universal parts of the forms.
- **Schedules:** Create standard lists (e.g. subpoena schedules, ID requirements, witness types).

If a change is required, e.g. your company rebrands and new imagery needs to be implemented, these changes can be made to the branding Content Blocks and will automatically update every document that uses them.

Even if reusable content is a small amount of text or a single image, the benefit of creating the Content Block is the speed at which multiple documents can be updated by making changes to the core version. This provides consistency that the same change has been made universally and also ensures no documents miss the update.

2. Content Blocks and Section Blocks

2.1 Why does a Content Block Need to be Connected to a Section Block?

A Content Block is the template connected to a Section Block. Just as an ordinary template can only be generated through a form, a Content Block can only be generated through a Section Block.

It isn't mandatory for a Section Block to have an associated Content Block - this is completely optional. Even where a Section Block has a Content Block, the questions and fields of the Section Block can be used in the template as independent fields, without the Content Block having to be used. This will become clearer as you progress through this guide and better understand the process.

For simplicity, consider a Section Block as a mini form and a Content Block as the associated mini template.

Summary:

Section Block: A group of reusable sections that can be inserted into multiple forms

- >> Intended to ask questions that are relevant to multiple documents
- >> May have multiple sections with full use of all Smarter Drafter features
- >> May have zero, one or more connected Content Blocks
- >> Where Content Blocks are connected:
 - they don't need to be inserted into a template that uses the Section Block
 - the Section Block fields can be used independently and/or within a Content Block

See the **Section Blocks** guide for detailed information.

Content Block: A partial Word document that can be inserted into multiple templates

- >> Intended to insert content that is relevant to multiple documents
- >> Needs to be connected to a Section Block
- >> Multiple Content Blocks can be connected to the same Section Block
- >> When a Section Block is used in a form, the connected Content Block doesn't necessarily need to be used in the form's template
- >> Content Blocks are inserted into templates like an ordinary field and will appear as a purple content control

3. Getting Started

3.1 Prepare the Content Block Word Document

Like ordinary templates, a Content Block starts as a standard Word document. The content should be approved and the Word document should be saved according to the organisation's folder structure. It is recommended that the main template folder structure be replicated and that Content Blocks are saved in the associated folder.

The next steps will differ depending on whether you are building a static or dynamic Content Block.

Static: A Content Block that does not have any fields, conditional rules etc
e.g. Text and/or images that don't require automation

Dynamic: A Content Block that requires automation
e.g. The content needs to use fields, logic, conditional rules etc to configure the output

3.2 Static Content Blocks

You can use a Content Block to simply store content in one place where it can easily be maintained, e.g. the organisation's logo. In this instance, the Content Block will be connected to a Section Block that has no interactive fields, noting:

- A Content Block must be connected to a Section Block
- A Section Block must contain at least one section
- A section must contain at least one field

To meet all the criteria, a Section Block can be built using a section that has a hidden heading and inserting a hidden field.

It is recommended to create a date field using a calculation for today's date so that the criteria is met with a field that is useful. This allows you to insert the Section Block, giving you access to use the Content Block without asking the form filler any unnecessary questions.

3.3 Dynamic Content Blocks

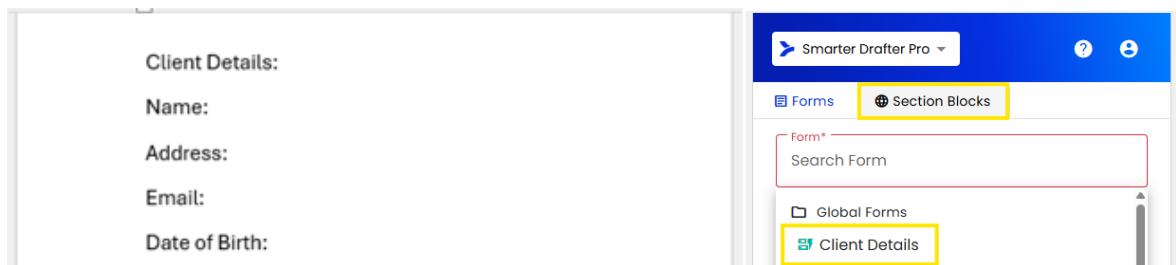
A dynamic Content Block works like an ordinary template, in that it is an automated Word document. Once a Content Block has been linked to a Section Block, it can be coded with the required fields, logic, named ranges etc.

4. Automate the Content Block

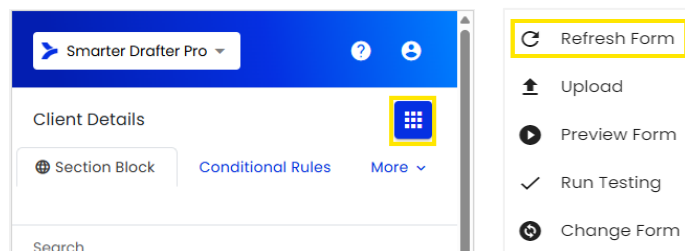
Note: If you have created a static Content Block, you don't need to apply automation. Jump to 4.2.

4.1 Add Fields and Automation to the Content Block

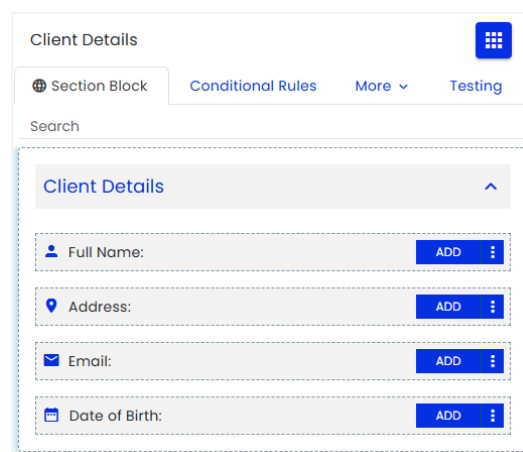
1. Open the Content Block in **MS Word** and enable the **Smarter Drafter Word Add-In**. In the Word Add-In, click **Section Blocks** list and find the Section Block that you require in the drop-down list. In this example, the Section Block is called Client Details.



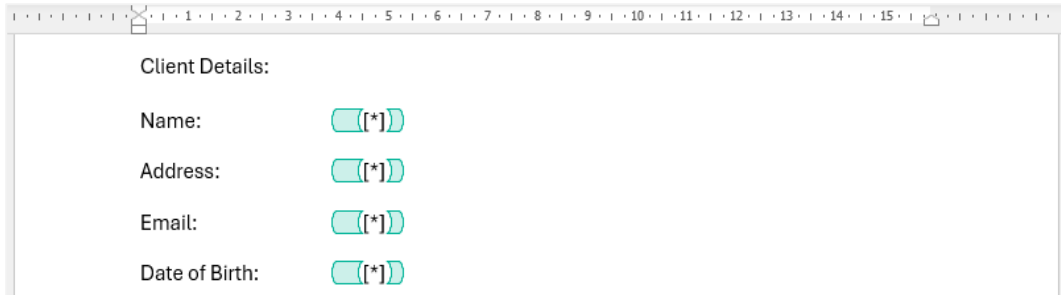
2. If the Section Block isn't visible right away, refresh the window by clicking on the **waffle button** and selecting **Refresh Form**.



3. The Section Block fields are now in the panel and available to be added to the document.



4. Insert the relevant fields and automation required in the Content Block. Follow the same process as automating a template (see the [Create a Simple Template](#) guide).



Client Details:

Name: (*)

Address: (*)

Email: (*)

Date of Birth: (*)

4.2 Updating the Word Add-In with Changes to the Content Block

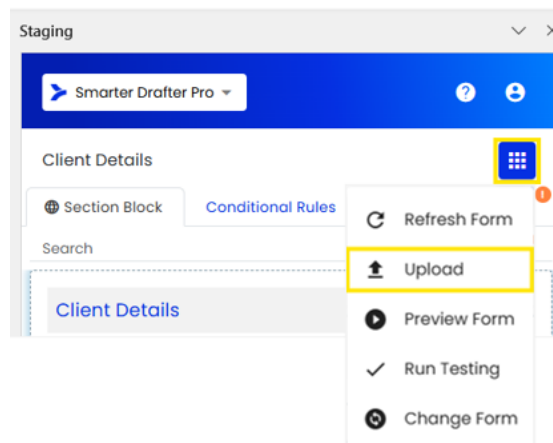
As you apply automation to the Content Block, you may discover additional fields/rules that are required (or existing ones that aren't needed). You can make these changes to the Section Block as you work on the Content Block, but you will need to refresh the Word Add-In to transfer the updates across. To refresh the Word Add-in, click on the **Waffle** button and select **Refresh Form**. The adjustments made in the Section Block will now be reflected in the relevant areas of the Word Add-in.

4.3 Upload the Content Block to the Section Block

Just as a template is uploaded to a form, a Content Block is uploaded to a Section Block in the same 2 ways.

Upload using the Word Add-In:

1. Save the Content Block.
2. Click the **waffle** button.
3. Click Upload.



4. Select the document from the pop-up window and click **Add**.

Template Upload

Filename: content block.docx

Select a template to replace, or leave unselected to create a new one:

Name	Uploaded Filename	
client details	client details.docx	<input checked="" type="radio"/>

Add

Cancel

Upload in the Section Block:

1. In Smarter Drafter, open the Section Block in **Application Settings**.
2. Ensure the Section Block is in draft mode.
3. Click on the Document tab and click on Content Blocks.
4. Click **+ New Content Block**.

Section blocks

Draft (editable)

Options

Client Detail

Last updated by Carmen Brooks on 29 Apr 2025 1:51 PM

Form

Document

Submissions

Settings

Role Mapping

Associated Forms

Conditional Rules

Replacement Rules

Content Blocks

Reload

+ New Content Block

Name	Uploaded Filename	Last Uploaded
No content blocks found. Try adding a new content block.		

5. In the pop-up, locate the saved Content Block and click **Save** to upload it.

Add New Content Block

Name *

client details

File *

client details.docx

Drag & drop your files here

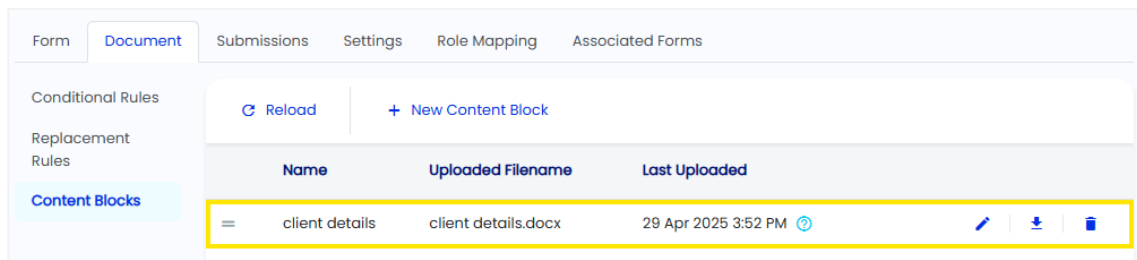
OR

Upload

Cancel

Save

6. The Content Block will appear in the list.



5. Test and Publish the Section Block

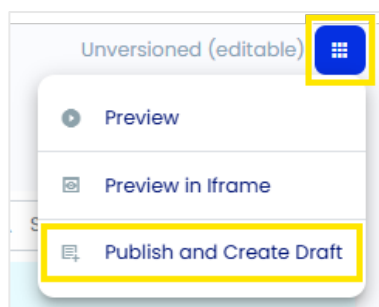
5.1 Testing

The Section Block is now set-up with a Content Block and can be tested by running a **Preview**, as you would do with a standard form. The Section Block and Content Block can be as extensive as an ordinary form and template, and testing should be run to the same standard.

5.2 Publishing

Once the Section Block and Content Block have been thoroughly tested and finalised, the Section Block needs to be published.

Open the **Section Block** you are working on, click the **Waffle** button and click **Publish and Create Draft**.



Note: A Section Block can't be used in a form until it has been published. Without the Section Block in the form, the Content Block won't be available to use in the template.

6. Amending Content Blocks

The process for amending Content Blocks is the same as an ordinary form.

1. Open the Content Block and make the necessary changes.
2. Upload the Content Block to the Section Block.
3. Test and publish.

Once the changes have been published, all templates that use the Content Block will now insert the updated version.

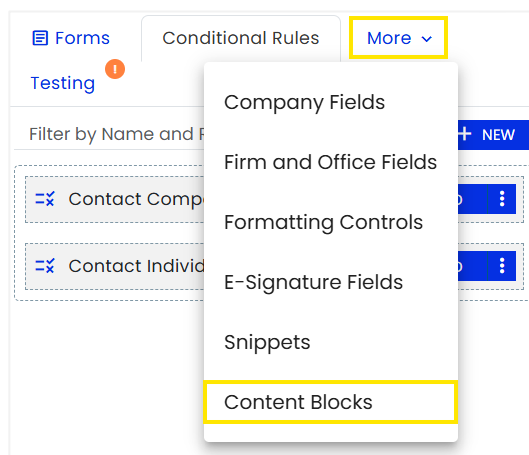
Note: The updated version of the Content Block won't be inserted into documents until the relevant Section Block has been published.

7. Using Content Blocks in Templates

7.1 Inserting Content Blocks into the Template

Insert the Content Block into a standard template from the Smarter Drafter MS Word Add-In.

1. Open the template.
2. Place your cursor where you want the Content Block data inserted.
3. Click on the **More** tab.
4. Click **Content Blocks**. This will bring up a list of the available Content Blocks.
5. Click **ADD** on the Content Block required and it will be inserted into the document as a purple content control.



6. An asterisk [*] will be applied as the default placeholder:



Note: Conditional Rules created in the Section Block will be transferred into the forms where the Section Block is used and will be available in the Word Add-In.

7.2 Test the Template



Run thorough testing of the template to check the behaviour of the Content Block. In particular, check:

- layout and spacing
- styles applied and formatting
- general flow of the document before and after the Content Block

Note: When a document is generated and contains Content Blocks, you will have full freedom to adjust the text that has come in. Once the Content Block has merged into the generated document, it is disconnected from the core Content Block and you can make any post-docgen changes required.

7.3 Section Blocks With or Without Content Blocks

A Section Block can have one or more connected Content Blocks, or alternatively none at all. When you view the list of Section Blocks in **Application Settings**, the blue or green icon will help you identify the difference:

	Section Blocks <i>with</i> content blocks: These forms will be identified using the green icon. A section block with a content block is used when the data captured will be presented exactly the same across all the standard forms it is inserted into.
	Section Blocks <i>without</i> content blocks: These forms will be identified using the blue icon. A section block without a content block is used when the data captured will be presented differently across the forms it is inserted into.

8. Building Blocks

Section Blocks and Content Blocks collectively are the Building Blocks of forms and templates.

8.1 Summary of Steps:

Create the Section Block

>> Create sections and fields, add logic, create repeats, build conditional rules, apply contact and user mapping, build calculations etc.

Create and automate the Content Block

>> Identify the content to use for the Content Block, apply automation, upload to the Section Block, then test and publish the Section Block

Import the Section Block into the Form

>> Import the required Section Block/s into the Form

Automate the template

>> Insert fields from the Section Block and/or insert the Content Block/s into the template

Finalise the Form

>> Publish >> Test >> Release the Form

Note: Many of the guides for Forms and Templates are relevant to Content Blocks and Section Blocks. Refer to these guides if you need more detailed instructions on the steps in this guide.
