

Form Sections and Pages

Module 3 – Sections and Fields

Version 1.0

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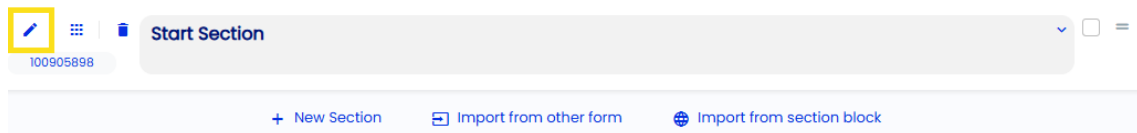
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1. Form Sections

A form section acts as a container within a form that holds fields (questions).

You can have multiple sections on a single page or select to start a section on a new page. The first section in a form will have the 'new page' option ticked by default and can't be adjusted.

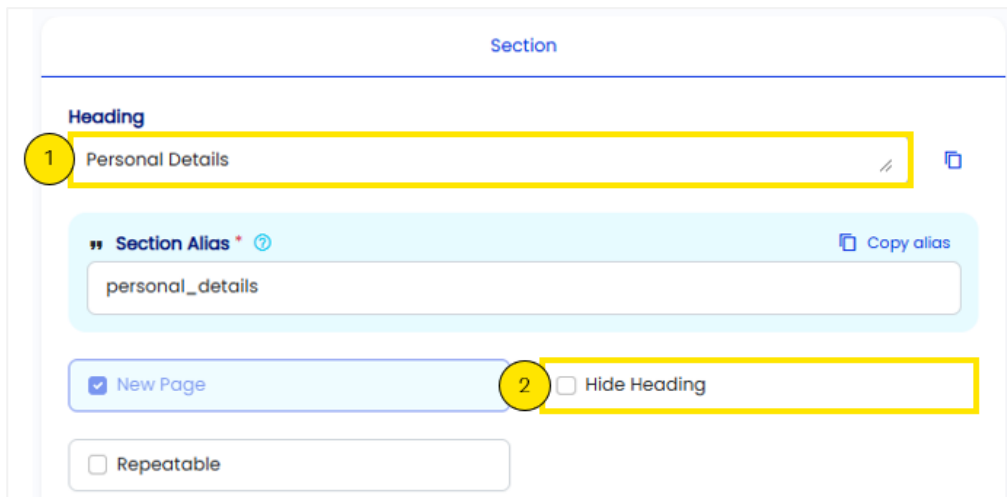
When you create a new form, an empty section will automatically be inserted and labelled 'Start Section'. Before adding fields to this section, it's important to rename it. Click the **pencil/edit button** to rename the section and alter settings.



1.1 Section Headings

The Section edit pane opens.

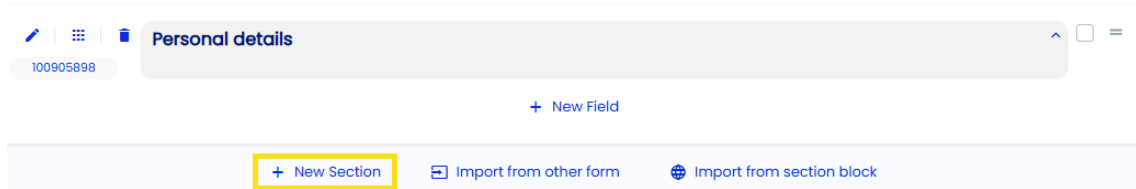
1. Add a **Heading name**.
2. If the heading name is not required to be visible in the form, check the box beside **Hide Heading**.



Note: The New Page option is automatically selected on the first section.

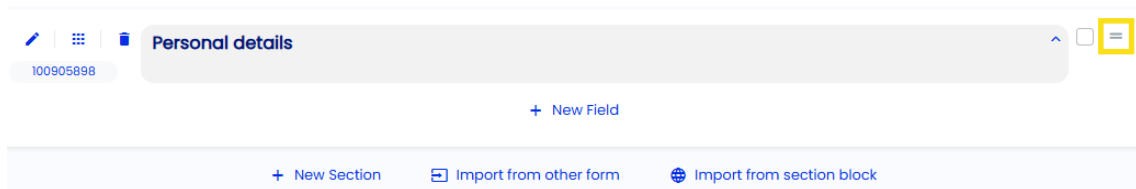
1.2 Adding a New Section

To add a section, click **New Section**.



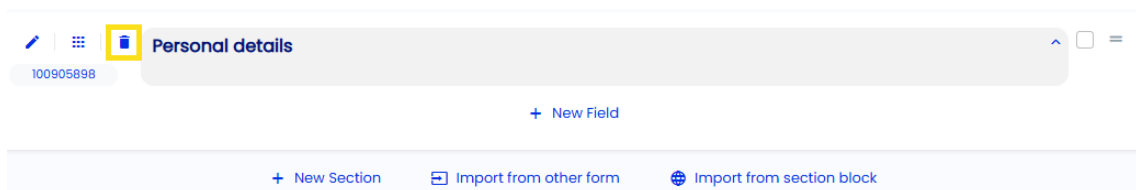
1.3 Reorder Sections

To reorder a section, click and hold the reorder button (two horizontal lines) and drag the section to the new location.



1.4 Delete a Section

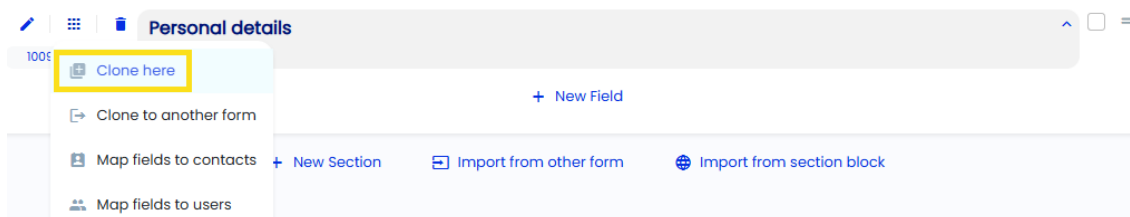
To delete a section, click the **trash can/delete** button.



1.5 Clone a Section

The waffle button reveals several options regarding cloning.

1. **Clone here** will create a clone of the section directly under the original section.
2. The cloned section will have a new section ID applied, and all contained fields will also be assigned new field IDs.



When you clone a section, you will have the option to adjust text in the cloned version. For example, if you cloned the Applicant section to create the Respondent section, you can use this feature to automatically have all references to Applicant converted to Respondent:

Clone Section ×

☒ Replace in section heading and field labels

Find *

✓

Replace With *

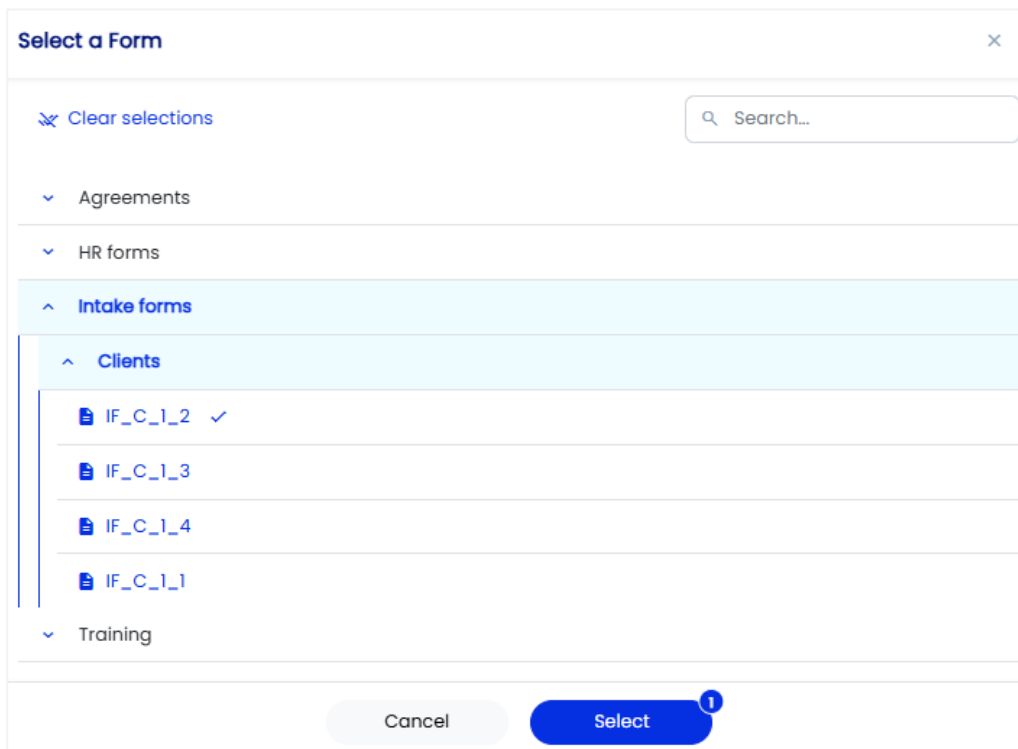
✓

✕ Cancel 👍 Ok

Note: The section alias will need to be adjusted in the cloned version. The save button of the cloned section won't be enabled until the alias is correct.

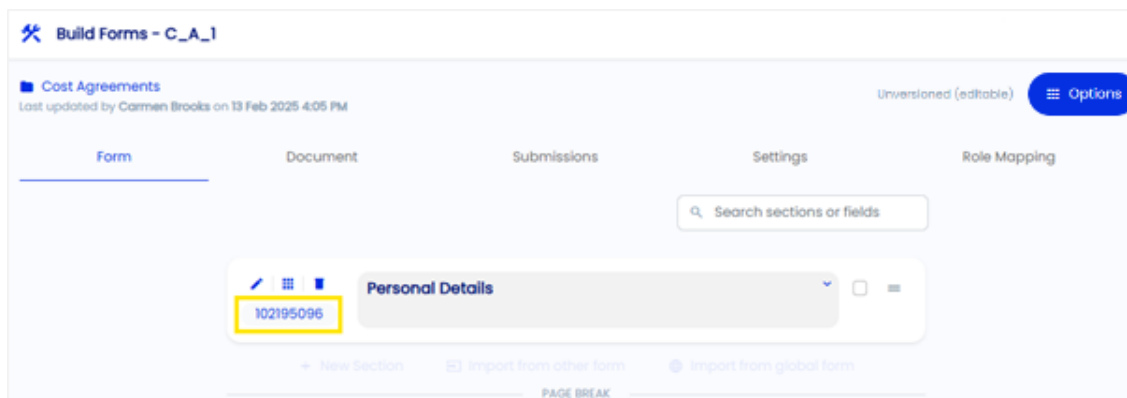
1.6 Clone to Another Form

Clone to another form opens a pop up where the destination form can be selected. Search the folders and click the relevant form, and click **Select**.



The 'Select a Form' dialog box shows a tree view of folders. The 'Intake forms' folder is expanded, and the 'Clients' sub-folder is also expanded. Under 'Clients', four forms are listed: 'IF_C_1_2' (with a checkmark), 'IF_C_1_3', 'IF_C_1_4', and 'IF_C_1_1'. At the bottom, there are 'Cancel' and 'Select' buttons. A search bar is located at the top right.

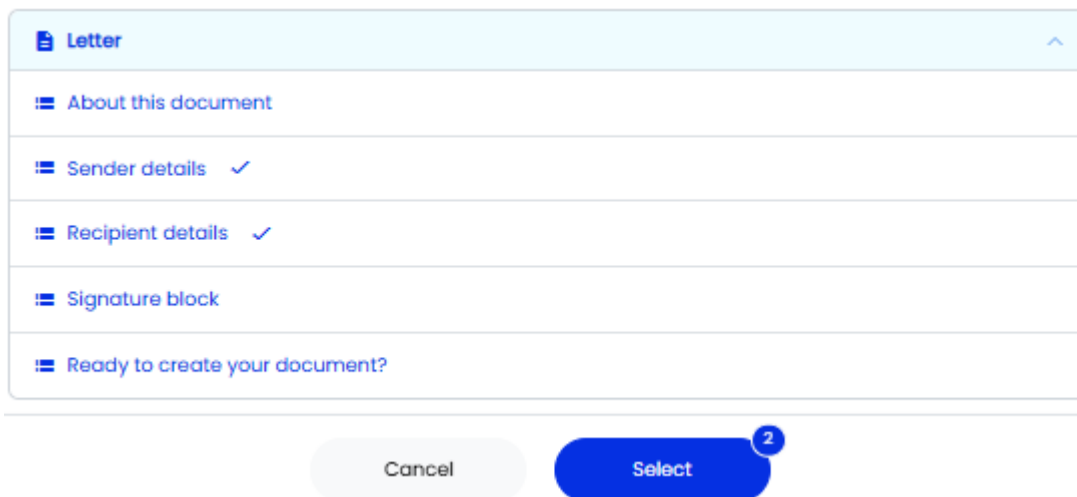
When the destination form for the cloned section is opened, the section will have been inserted at the end of the draft version. It has a new section ID and all of the contained fields will also have new IDs. The section and field IDs are used in a number of functions, including conditional rules, calculations and logic. The section and field IDs will automatically update in the relevant conditional rules, calculations and logic as part of the cloning process. You can then reorder the cloned section and make any other necessary adjustments.



The 'Build Forms - C_A_1' interface shows a form titled 'Cost Agreements'. The 'Form' tab is selected. A search bar is present. A section titled 'Personal Details' is highlighted with a yellow box, and its ID '102195096' is visible. Below the section, there are buttons for 'New Section', 'Import from other form', and 'Import from global form'. A 'PAGE BREAK' indicator is also visible.

1.7 Import from Another Form

Import from another form opens a pop up where the form you require the section/s from can be selected. Search the folders and click the relevant form. A drop-down will appear showing the sections within that form. Select the required section/s (which will be marked with a tick) and click **Select**.

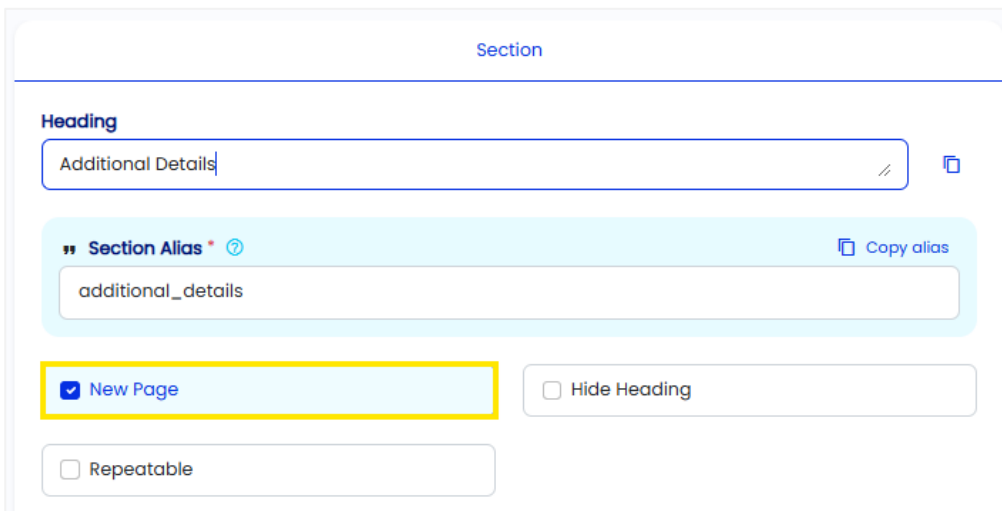


The selected sections will be copied into the form at the location where you clicked Import.

The section and field IDs will automatically update as part of the cloning process. You can then reorder the cloned section/s and make any other necessary adjustments.

2. Page Breaks

The New Page checkbox is optional. If the box is ticked, the page will break before this section is shown to the form filler. If the box is not ticked, the section will appear on the same page as the preceding section. Consider where page breaks are required so that the form filler experience is smooth.



3. Advanced Features

You will see an option for **Repeatable** in section properties, and an option to **import from a Content Block** when building sections. Both of these features are advanced tools and are briefly explained below for context.

3.1 Repeatable Content

Repeatable Content is a feature to enter multiple instances of the same section questions, e.g. allowing the filler to enter multiple children. This topic is covered in the Repeating Content guide.

3.2 Import from Content Block

Content Blocks are a feature to create a single instance of a section that can be reused in unlimited forms, e.g. allowing the builder to create a single section for children and then having the ability to use it in many other forms. This topic is covered in the Content Blocks guide.