



Quick-Start Guide

Version 2

Forms don't need to be dumb as bricks.

You can teach them, they'll learn.



In less than 5 minutes you can teach your forms to recognize people and the roles they play; pronouns; the rules for singular and plural agreement between nouns and between nouns and other words; when to use articles such as "a" and "an;" and basic punctuation.

In 30 minutes you can teach your forms nearly everything they need to know to help you earn a living: how to count days between court appearances and filings; conditional statements; how to build lists that can relate to each other; even some pretty cool Boolean logic.

*Best of all, it takes no extra time
to teach your forms to not make mistakes.*

Imagine that.

Forms without mistakes.

We call them brilliant.

You will, too.



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One-Page Cheat Sheet

For those who are driven to get started *right now*, without filler or fluff:

1. Install TheFormTool

Double-click the .zip file you downloaded to see the files it contains.

Double-click the .docm file (**TheFormTool.docm** or **TheFormToolPRO.docm**) to install the program.

2. Activate it

If you purchased TheFormTool PRO, go to the new TheFormTool tab in Microsoft Word, click **Options, License Code**, and enter the Firm Name and License Code we emailed to you.

Tip: Skip Steps 3 and 4 below and watch our 3-minute video instead: www.video1.theformtool.com

3. Create a form

Open a document or form you've used in the past, and save a copy of it wherever you like to store forms.

Older Files: If you're starting with an older document (created in Word 2003 or earlier), be sure to save it in one of Word's new formats (.docx or .dotx) with the 'Maintain Compatibility' checkbox **UNCHECKED**.

Add a Q&A table at the bottom of the form by clicking **Table** on TheFormTool tab.

Type questions in the Question column and a short label for each question in the Label column, like so:

TheFormTool (c) 2011 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Add fields to the form by placing the cursor wherever a field is needed and clicking **Field** on TheFormTool tab. The result will look something like this:

My name is {Signer}. I was born on {DOB}.
Signed: _____ {SIGNER}

Save and close the finished form.

4. Use your new smart form to create a document

Open the form you created in Step 3. Type answers in the Q&A table and click **Fill** on TheFormTool tab. Done!

5. For later

This manual and the Expert User Guide are available at www.theformtool.com, along with videos, program support, and forums where you can ask questions, report problems, make suggestions, and exchange Tool Tips with the creators and other users of TheFormTool. We'll see you there!

Installing TheFormTool

Step 1: Open the Installation File

Do you have the downloaded file handy?

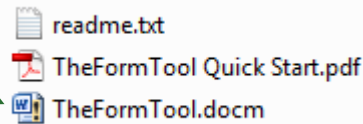
You can always find the most current version of TheFormTool here: www.update.theformtool.com.

TheFormTool (Free Version)

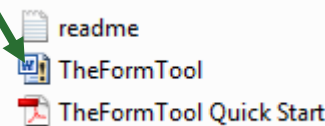
If you have the free version of TheFormTool, open the downloaded file and you'll see it contains a file named **TheFormTool.docm**.

Double-click that file to install TheFormTool.

If file extensions are visible on your computer, it will look like this:



If file extensions are not visible on your computer, it will look like this:

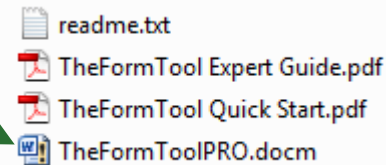


TheFormTool PRO

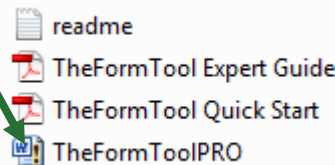
If you have TheFormTool PRO, open the downloaded file and you'll see it contains a file named **TheFormToolPRO.docm**.

Double-click that file to install TheFormTool PRO.

If file extensions are visible on your computer, it will look like this:



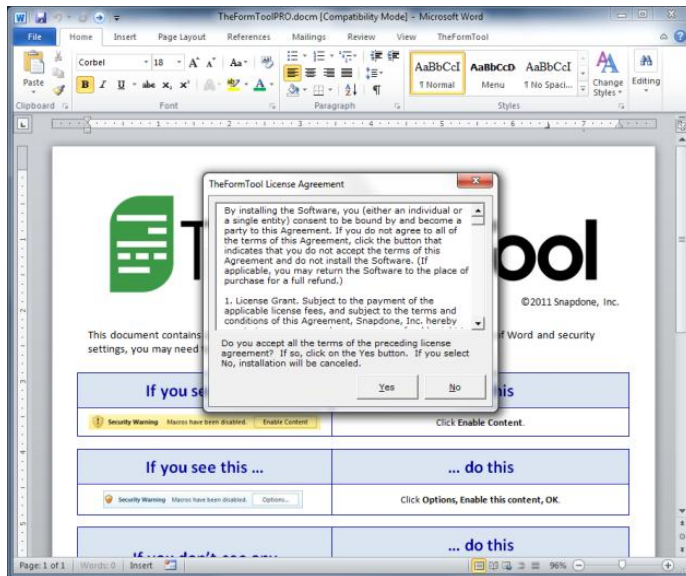
If file extensions are not visible on your computer, it will look like this:



Step 2: Security Warnings

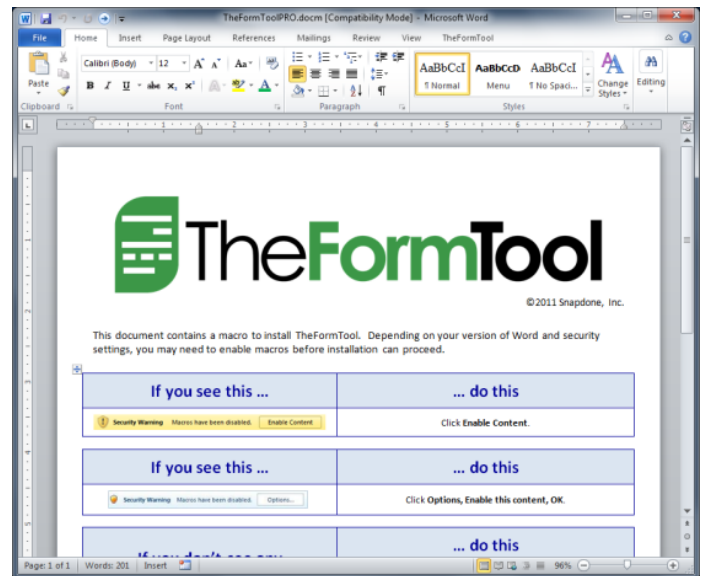
Depending on Windows and MS Word settings, you may need to respond to one or more security warnings before installation can proceed.

If you see this ...



You're almost done. Click **Yes** to the license agreement, then **OK** to install.

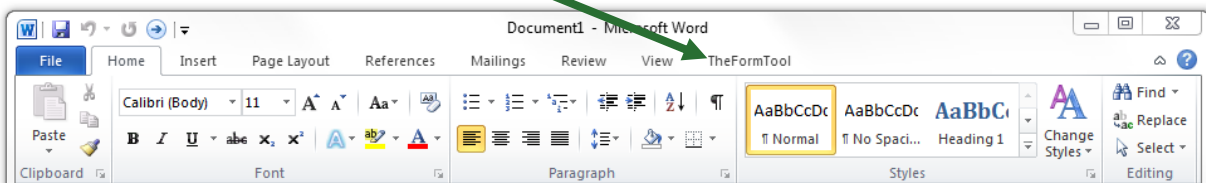
If you see this ...



Follow the on-screen instructions to respond to your computer's security warnings.

Step 3: Close and Reopen Word

Close MS Word completely, including all open documents. When you reopen MS Word, you'll find a new tab on Word's ribbon menu labeled **TheFormTool**. Click that tab to reveal The**FormTool** commands.



If The**FormTool** tab does not appear, try restarting your computer, and if that doesn't work please contact us so we can help get you up and running (support@theformtool.com).

Step 4: Sharing Information on a Network (Requires TheFormTool PRO)

The**FormTool** initially saves program information (saved answers, saved tables, holidays, and Master Lists) on your local computer. But if your firm owns more than one license, you will likely want to share all of that information with other people in your office. To do so, click **Options**, **Path** and enter the path to a shared folder on your network.

Creating a Form

We'll turn this document into a form.

My name is Abigail Bentley. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

Step 1: Create the Q&A Table

Click  **Table** on The**FormTool** tab in Word's ribbon to add a Q&A table to the end of the form.

My name is Abigail Bentley. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

TheFormTool (c) 2011		
Label	Question	Answer

In this example, we need to ask the form user for the signer's name and birthdate. Type two questions in the Q&A table, including a short label for each.



My name is Abigail Bentley. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY


TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Adding Rows to the Q&A Table

As with any table in Word, add rows by pressing **Tab** when your cursor is in the table's last cell.

The**FormTool PRO** only: Further into the process of creating a form, the Q&A table is "locked" so form users can't accidentally alter it. But you can still add rows by clicking  **Row**,  **Add**.

Step 2: Add Fields to the Form

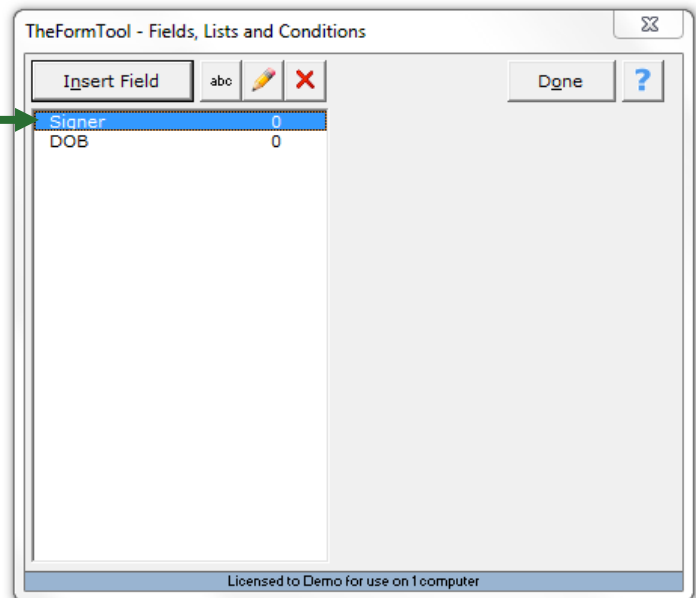
Select “Abigail Bentley” and click  **Field** to open the screen below.

My name is Abigail Bentley. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

All the questions in the Q&A table are listed here, using the labels you provided. Make sure **Signer** is selected and click **Insert Field**.



TheFormTool - Fields, Lists and Conditions

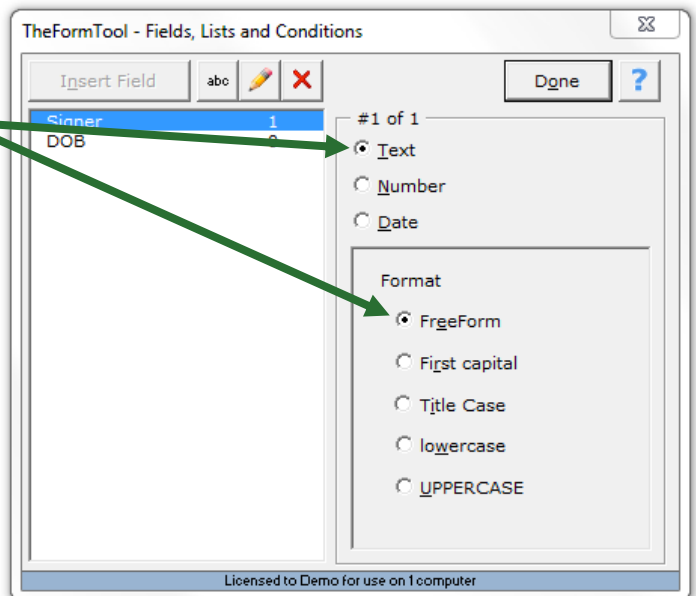
Insert Field abc ✎ ✕

Signer 0
DOB 0

Done ?

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Several field formats appear. For our first field, the default is correct (**Text, FreeForm**), so click **Done**.



TheFormTool - Fields, Lists and Conditions

Insert Field abc ✎ ✕

Signer 1
DOB 0

Done ?

#1 of 1

☒ Text
☐ Number
☐ Date

Format

☒ FreeForm
☐ First capital
☐ Title Case
☐ lowercase
☐ UPPERCASE

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Notice that the field you added shows up as a gray bracketed item: {Signer}.

We'll add two more fields.

My name is {Signer}. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

The second field is a Date field. Use the same steps as above, but this time choose the **DOB** label and **Date** format.

My name is {Signer}. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

And once more for the last field. This time choose the **Signer** label and **UPPERCASE** format.

My name is {Signer}. I was born on {DOB}.

Signed: _____
ABIGAIL BENTLEY

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

The finished form looks like this.

My name is {Signer}. I was born on {DOB}.

Signed: _____
{SIGNER}

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Using a Form

Step 1: Type Answers


Type your answers in the Q&A table, like so:

My name is {Signer}. I was born on {DOB}.

Signed: _____
{SIGNER}

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the name of the signer?	Horace Blixt
DOB	What's the birthdate of the signer?	4/17/60




Step 2: Fill in the Form

Click  **Fill** to fill in the form. Done!

My name is Horace Blixt. I was born on April 17, 1960.

Signed: _____
HORACE BLIXT

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the name of the signer?	Horace Blixt
DOB	What's the birthdate of the signer?	4/17/60

You can also click  **Reset** to return the form to its original state,  **Blanks** to replace fields with blank lines, or  **Petrify** to convert all fields to plain text and remove the Q&A table.

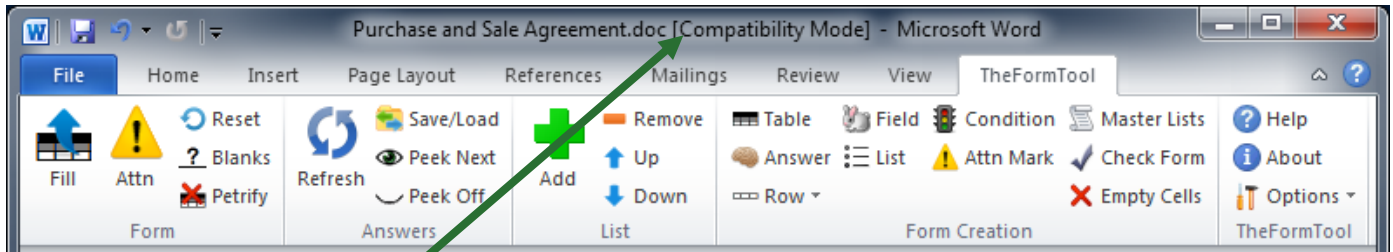
Turning Old Files Into New Forms

Old File Formats

You're using Word 2007 or Word 2010 now, but some of your old documents and forms might have been created with earlier versions of Word. It's important to convert those old files to the new format so that all of TheFormTool's features are available.

Does it need to be converted?




Look at the top of the Word screen.



If you see "Compatibility Mode" beside the document name, it needs to be converted by following the steps below.

Converting an old file

Open your old document or template in Word. Depending on whether you use Word 2007 or Word 2010:

 Word 2007	 Word 2010
<p>Click the  Office button (the round button in the top left corner), then click Save As.</p> <p>In the Save as type box, choose Word Document (.docx) or Word Template (.dotx). (Read more about documents versus templates below.)</p> <p>Near the bottom of the screen, make sure the Maintain compatibility with Word 97-2003 checkbox is UNCHECKED.</p> <p>Click Save.</p>	<p>Click File, Save As.</p> <p>In the Save as type box, choose Word Document (.docx) or Word Template (.dotx). (Read more about documents versus templates below.)</p> <p>Near the bottom of the screen, make sure the Maintain compatibility with previous versions of Word checkbox is UNCHECKED.</p> <p>Click Save.</p> <p>If you <i>still</i> see [Compatibility Mode] at the top of the screen, click File, Info, Convert.</p>


Documents Versus Templates

As you create forms, should you save them as documents (files that end with **.docx**) or templates (files that end with **.dotx**)? The **FormTool** works fine with both types of files, but saving forms as templates does have one important advantage: When form users double-click a template file to open it, Word creates a *new unsaved document* based on that template. This makes it impossible for the form user to accidentally overwrite the original form -- when they click **Save**, they are prompted to save their brand new document elsewhere.

As the form creator, though, you will sometimes need to go back and make revisions to the original form. Instead of double-clicking the template file to open it, you need to right-click the file and choose "Open" from the list of choices. This opens the form itself, rather than creating a new document, so you're ready to make changes and save the revised form for others to use in the future.

Creating Smarter Forms (Requires TheFormTool PRO)

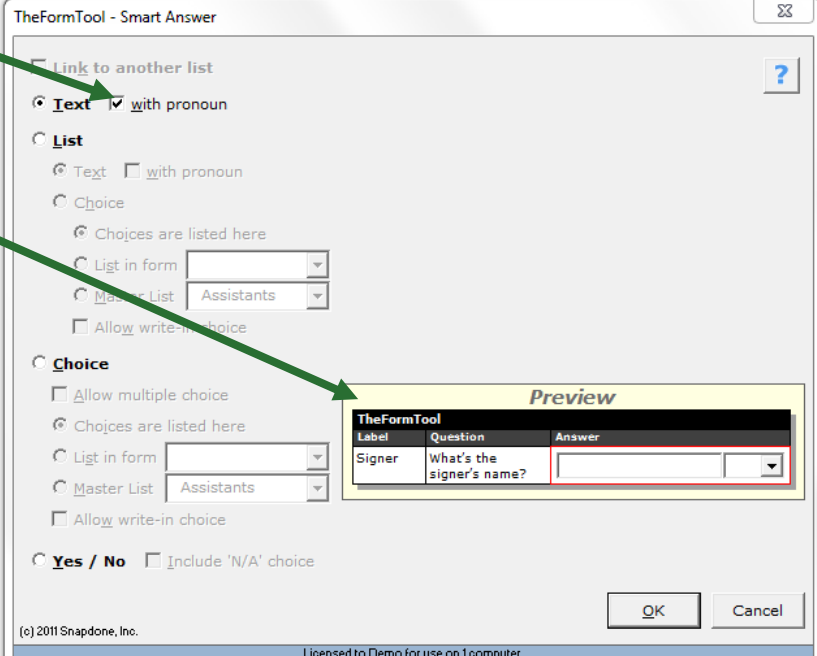
Smart Answers

We used Text answers in the example above, but several other types of answers are available. To change an answer's type, select it in the Q&A table and click  **Answer** to open the Smart Answer screen shown below.

Pronoun Answers

Select **with pronoun** to include a pronoun box alongside a Text answer.

The Preview area shows what the answer will look like.



TheFormTool - Smart Answer

☐ Link to another list

☒ Text ☒ with pronoun

☐ List

☐ Text ☐ with pronoun

☐ Choice

☒ Choices are listed here

☐ List in form

☐ Master List

☐ Allow write-in choice

☐ Choice

☐ Allow multiple choice

☒ Choices are listed here

☐ List in form

☐ Master List

☐ Allow write-in choice

☐ Yes / No ☐ Include 'N/A' choice

Preview

TheFormTool	Label	Question	Answer
	Signer	What's the signer's name?	<input type="text"/>

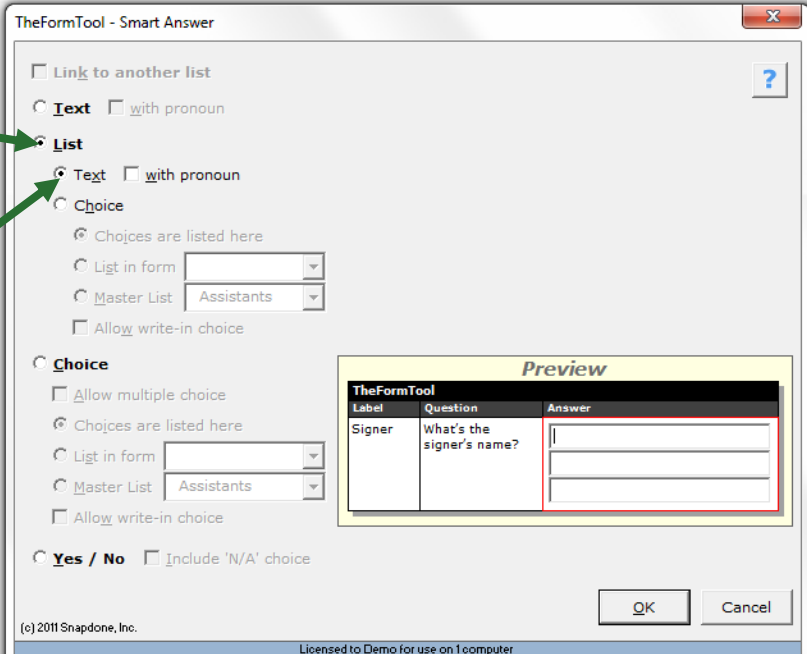
OK Cancel

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List Answers

List answers allow the form user to type a series of items in a single answer.

Note that List answers contain a series of answers-within-an-answer. Each item in the series is either a Text answer (selected here) or a Choice answer.



TheFormTool - Smart Answer

☐ Link to another list

☐ Text ☐ with pronoun

☒ List

☒ Text ☐ with pronoun

☐ Choice

☒ Choices are listed here

☐ List in form

☐ Master List

☐ Allow write-in choice

☐ Choice

☐ Allow multiple choice

☒ Choices are listed here

☐ List in form

☐ Master List

☐ Allow write-in choice

☐ Yes / No ☐ Include 'N/A' choice

Preview

TheFormTool	Label	Question	Answer
	Signer	What's the signer's name?	<input type="text"/>
			<input type="text"/>
			<input type="text"/>

OK Cancel

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Choice Answers

Choice answers present a series of choices to the form user.

The choices are drawn from one of three sources. The most common source is **Choices are listed here**.

See The Expert User Guide for examples of the other two sources: **List in form** and **Master List**.

Click **+** plus to add a choice, **x** to remove a choice, the **pencil** to edit a choice, and the **up/down** arrows to rearrange choices.

The screenshot shows the 'TheFormTool - Smart Answer' dialog box. The 'List' section is selected, and 'Choice' is the active option. The 'List of Choices' section is circled in green, showing a list with 'Arbitration', 'Jurisdiction', and 'Severability'. To the right of the list are icons for adding (+), removing (x), editing (pencil), and rearranging (up/down arrows). A 'Preview' window at the bottom right shows a form with a question 'Which clause should be included?' and a dropdown menu.

Yes/No Answers

Select **Yes/No** when asking for a yes-or-no response.

The **Include 'N/A' choice** checkbox determines whether "not applicable" is included as a third response.

The screenshot shows the 'TheFormTool - Smart Answer' dialog box. The 'List' section is selected, and 'Choice' is the active option. The 'Yes / No' radio button is selected. The 'Include 'N/A' choice' checkbox is unchecked. The 'List of Choices' section is not visible. A 'Preview' window at the bottom right shows a form with a question 'Is the employee a U.S. citizen?' and a dropdown menu with 'Yes' and 'No' options.

Linked List Answers

Select **Link to another list** to ask for additional information about each item in an earlier List answer.

This example uses a series of **Text** answers to ask for each child's birthdate, but other questions might use **Choice** answers ("What type of stock does each shareholder own?") or **Yes/No** answers ("Is each child over 18 years old?")

TheFormTool - Smart Answer

☒ **Link to another list**

Children

For each item in the list above, this answer provides:

☒ **Text**

☐ **Choice**

☐ Allow multiple choice

☒ Choices are listed here

☐ List in form: Children

☐ Master List: Assistants

☐ Allow write-in choice

☐ **Yes / No** ☐ Include 'N/A' choice

Preview

Label	Question	Answer
Children	List the will maker's children.	Tic: Tac: Toe:
DOB	What's the date of birth for each child?	Tic: Tac: Toe:

OK Cancel

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Field Types

We already glimpsed Text, Date, and Number fields in the first example on page 6. Several other field types add even more intelligence to your forms.

Pronoun Fields

Pronoun fields automatically choose words like "he/she" and "him/her". They also automate gender-related words like "husband/wife", "son/daughter", and "testator/testatrix".

TheFormTool - Fields, Lists and Conditions

Insert Field abc X

Done ?

Name

#1 of 1

☒ **Pronoun**

☐ Text

☐ Number ☐ Singular/Plural

☐ Date

☒ **Defined**

He | She | It | They

☒ Title Case

☐ lowercase

☐ UPPERCASE

☐ Custom

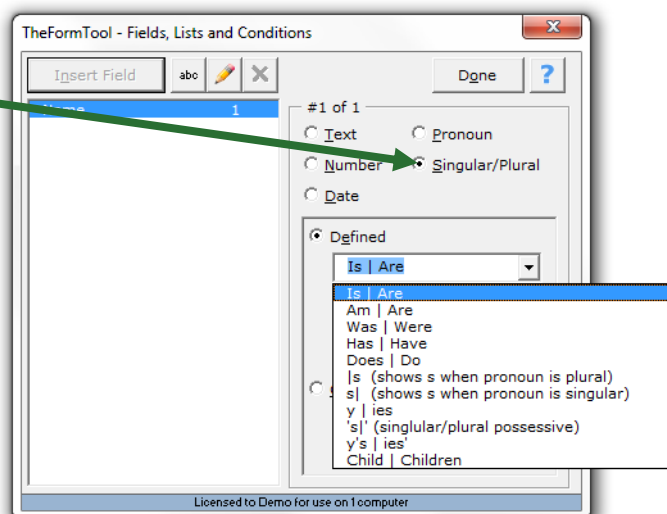
He|She|It|They

☒ Abbreviate

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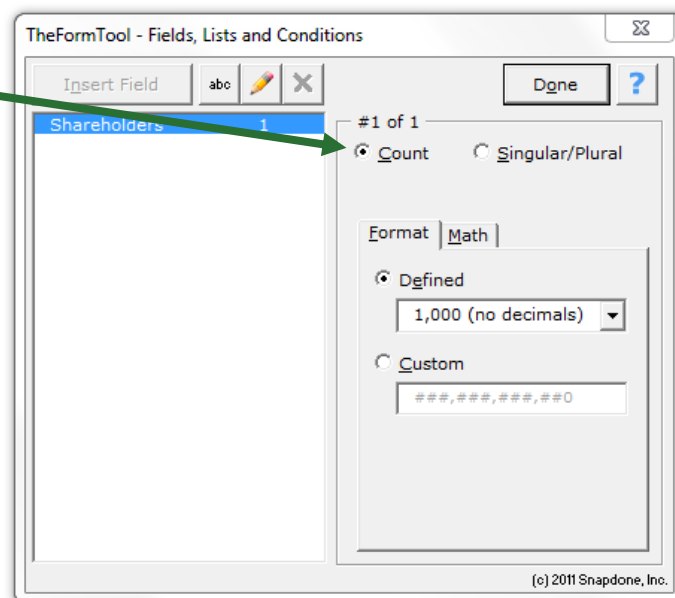
Singular/Plural Fields

Singular/Plural fields automatically choose the proper word depending on (1) which pronoun is selected in a Pronoun answer; or (2) how many items appear in a List answer.



Count Fields

Count fields refer to the number of items in a List answer. They can be formatted as numbers or words.



Conditions



Use Conditions to include or exclude text depending on the form user's response to a question in the Q&A table.

We'll turn this document into a form, adding Conditions to make it work even when the signer is not married.

My name is Terry Vance. My spouse's name is Gena Vance.

Click  **Table** to add a Q&A table and type the two questions shown here.

My name is Terry Vance. My spouse's name is Gena Vance.

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Replace the names in the document with fields.

(See page 6 if you need any help with that.)

My name is {Signer}. My spouse's name is {Spouse}.


TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Type an alternate second sentence for when the signer is unmarried.

My name is {Signer}. My spouse's name is {Spouse}. I am not married.

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Finally, we'll add two conditions so that the proper second sentence appears when the form is used.

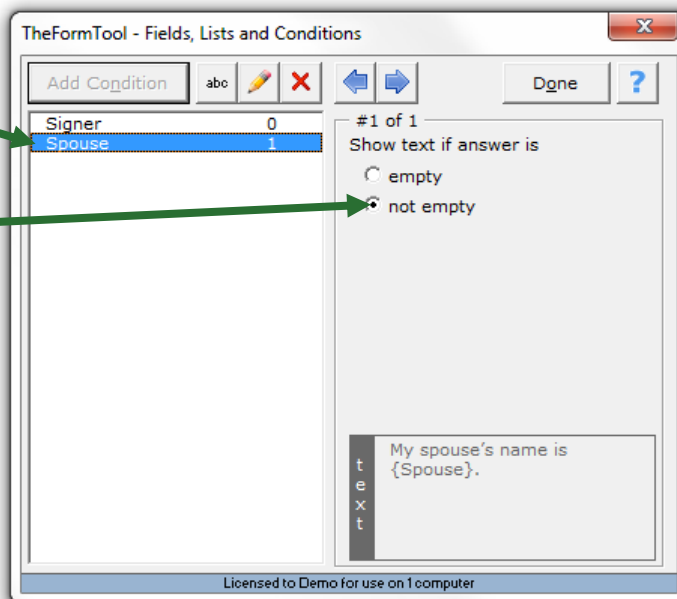
Select the highlighted text (including the two spaces at the end of the sentence) and click  **Condition**.

My name is {Signer}. My spouse's name is {Spouse}. I am not married.

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Select **Spouse** and click **Add Condition**.

We only want this sentence to appear when there is a spouse, so select **not empty** and click **Done**.



We'll treat the last sentence similarly, but with an opposite Condition.

Select the highlighted text, click **Condition**, select **Spouse**, and click **Add Condition**.

This time select **empty** and click **Done**.

My name is {Signer}. {Spouse<>[empty]:My spouse's name is {Spouse}. }I am not married.

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

The finished form looks like this.

My name is {Signer}. {Spouse<>[empty]:My spouse's name is {Spouse}. }{Spouse=[empty]:I am not married.}

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Now look at how the form responds to different circumstances when it is used.

When a Spouse is typed, the result looks like this.

My name is Betty Miller. My spouse's name is Jerome Miller.

TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the signer's name?	Betty Miller
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	Jerome Miller


And when the Spouse answer is left empty, the result looks like this.

My name is **Betty Miller**. I am not married.

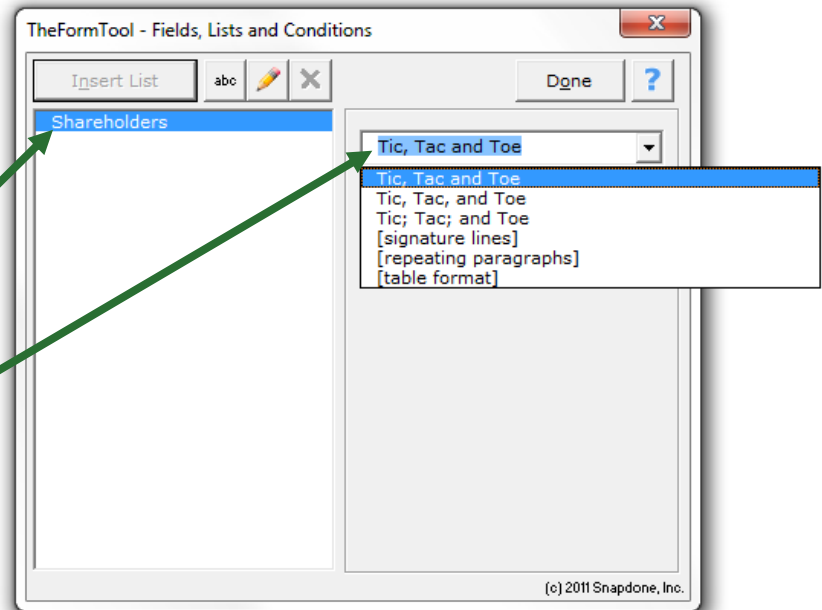
TheFormTool (c) 2011		
Label	Question	Answer
Signer	What's the signer's name?	Betty Miller
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Lists

Lists are like Fields, except they are used with List answers to add a whole series of items to a form.

To insert a List (shareholders, signers, children, executors, etc.), click  **List**, select one of the List answers shown, and click **Insert List**.


Select a format, then click **Done**.




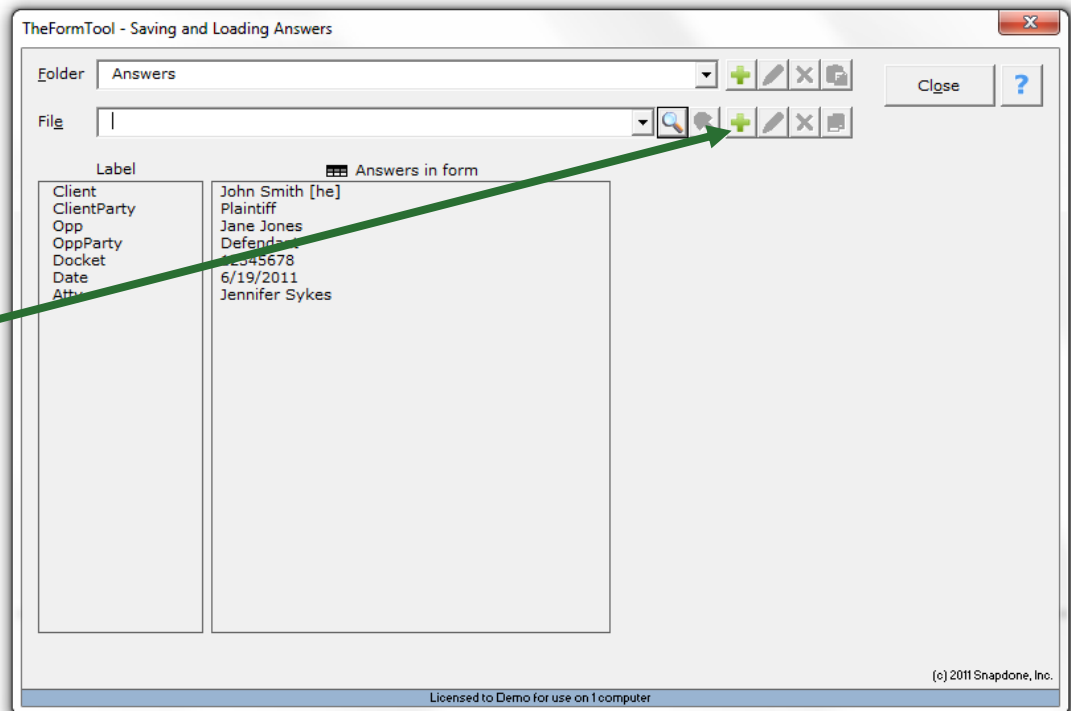
Capturing and Reusing Data (Requires TheFormTool PRO)

Answers can be saved from one form and reused in a different form (for the same client on another day, for example).

Saving Answers

After typing answers in a Q&A table, click  **Save/Load** to open this screen.

Click  plus to create a file for this matter, and give the file a name like "Smith v. Jones".



TheFormTool - Saving and Loading Answers

Folder: Answers

File:


Label

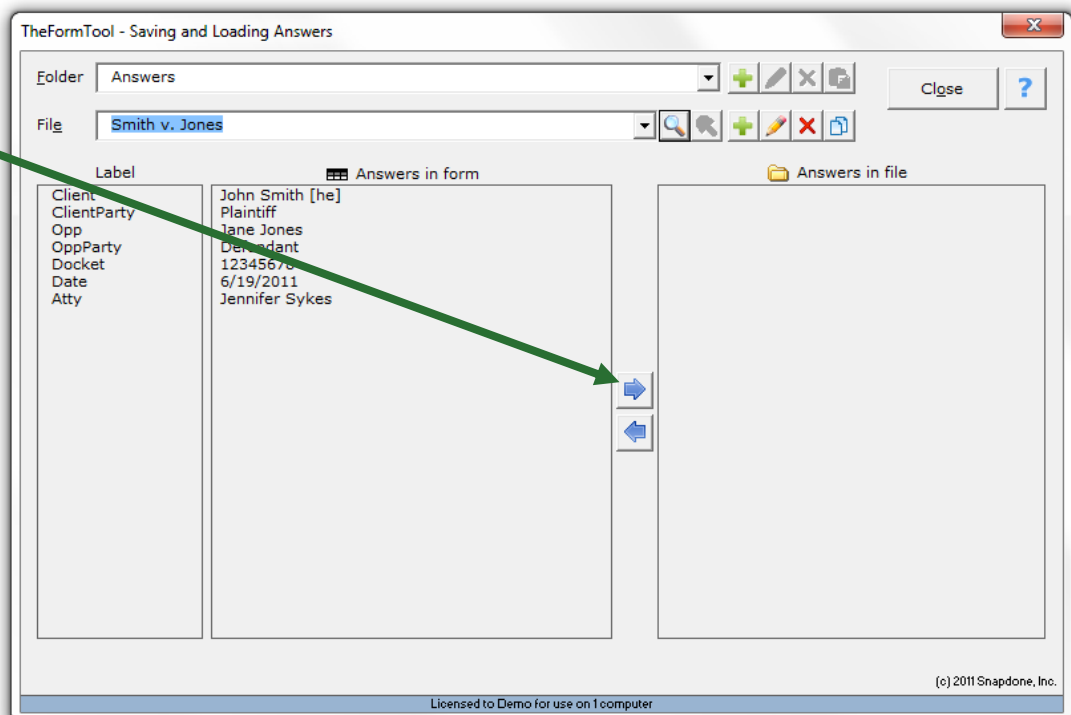
Label	Answers in form
Client	John Smith [he]
ClientParty	Plaintiff
Opp	Jane Jones
OppParty	Defendant
Docket	12345678
Date	6/19/2011
Atty	Jennifer Sykes

Close ?

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Click the  right arrow to indicate answers should be copied *from the form to the file*.



TheFormTool - Saving and Loading Answers

Folder: Answers

File: Smith v. Jones

Label

Label	Answers in form
Client	John Smith [he]
ClientParty	Plaintiff
Opp	Jane Jones
OppParty	Defendant
Docket	12345678
Date	6/19/2011
Atty	Jennifer Sykes

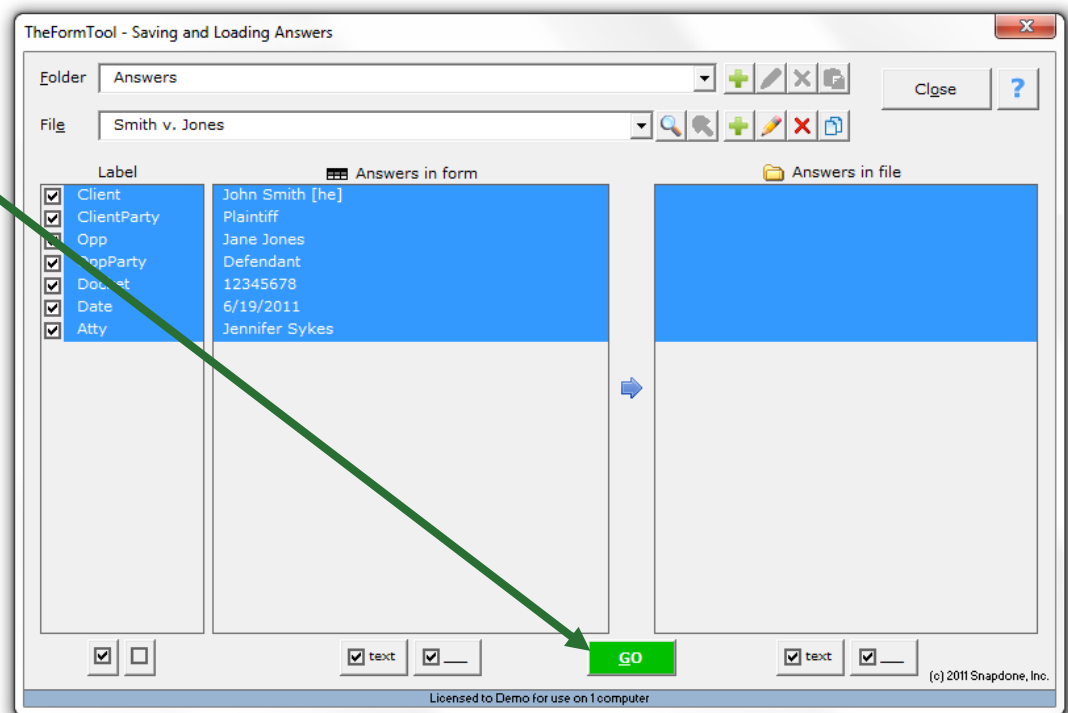
Answers in file

Close ?

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Click GO to finish.

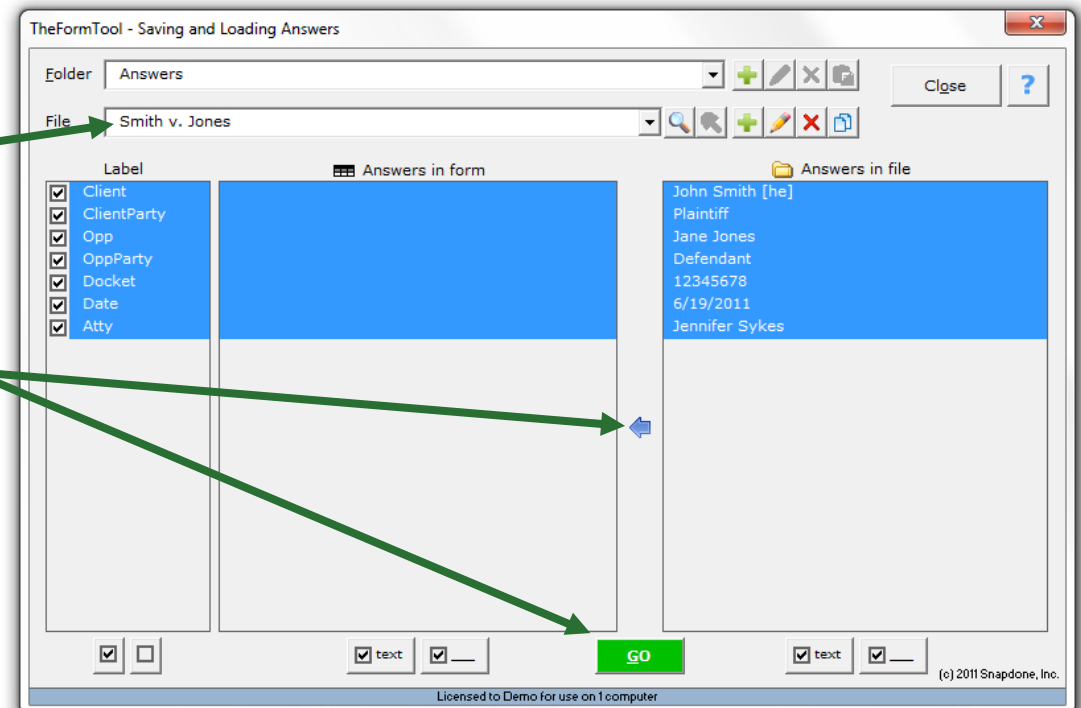


Loading Answers

When you're working on another form for the same client, simply load the answers you saved previously.

Click  Save/Load and select the **Smith v. Jones** file in the dropdown box.

Click the  left arrow to indicate answers should be copied from the file to the form and click Go.





Finally, we're here to help, to listen to your suggestions.

Here are some helpful online resources at www.theformtool.com:

All You Need to Know About TheFormTool in 3 Minutes	A (very) short video. Learn the basics in minutes.
TheFormTool Quick-Start Guide	You're reading it now! For those who prefer a quick written tutorial.
TheFormTool PRO in 5 Minutes	A short video showcasing features of TheFormTool PRO.
TheFormTool PRO Expert User Guide	For the true form aficionado who needs to <i>know it all</i> .

TheFormTool community is a great resource you can access through TheFormTool Forum: www.forum.theformtool.com.

Please feel free to contact us at support@theformtool.com.

If you haven't done so already, sign up for our newsletter so that you can stay informed of updates and improvements we'll be making over the next months: www.newsletter.theformtool.com.

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