

## Review of TheFormTool Pro 2.2

By Jeanette Otis

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*In TL NewsWire in January 2012, we were the first to report on a new document assembly add-on for Microsoft Word called TheFormTool PRO. Since then, the company has shipped a new version. In this issue of SmallLaw, Microsoft Office expert Jeanette Otis, who works for a Bloomington, Illinois personal injury lawyer, reviews TheFormTool PRO. Jeannette used it for several months on real documents to find out if it's a worthwhile investment for a small law practice. In her review, Jeannette walks you through the installation, basic features, and advanced features — and also bestows a TechnoScore.*

**W**hen you borrow a document from one client's file to create a new document for another client, you run the risk of not completely cleansing the document. Embarrassing! Or you may instead use a huge template from which you pull pertinent paragraphs. That's also error-prone.

Plus your efficiency drops off a cliff as you attempt to catch every pronoun and case reference. To make matters worse, Microsoft

Word's textfields and mergefields are difficult to use.

Your Dollar Matters' *TheFormTool PRO 2.2* is a document assembly add-on for Microsoft Word 2007 and 2010 (Windows) designed to make drafting legal documents easier and eliminate common errors. I received a free copy of the software for the purposes of this review. It costs \$89 per user.

### AN OVERVIEW

When I applied to write this review for *SmallLaw*, I doubted that the powers that be would choose a legal assistant from a small town solo office. So I was quite excited to put *TheFormTool PRO* through its paces in our office.

Installation is a breeze. Download the ZIP file, unzip it, read the Read Me and Help files if you wish, or just double click and follow the two-step instructions.

**For the price, support, community and features, you can't ask for much more. Thus, I give TheFormTool PRO a TechnoScore of A.**

I used *TheFormTool PRO* with Word 2010. It adds an icon/text interface to the ribbon. The icons are clean and logical. The ribbon contains five submenus: Form,



Answers, List, Form Creation, and *TheFormTool*.

The Form submenu consists of Field, List, Condition, Attention Mark, Table, Answer, Row, Master Lists, Check Form, and Empty Cells. A Field holds text, numbers, or dates. Lists hold more than one of something (e.g., your client is suing three defendants). Conditions show or hide text depending on the answer(s) in the Q&A table (see below). Use Attention Marks to enter text that the form cannot predict. When *TheFormTool PRO* fills your form, it automatically seeks out any Attention Marks and forces you to respond to all of them.

Other tools that get a lot of use include Table (transforms a model document into a TheFormTool PRO form), Master Lists (creates lists available in every document — more on these below), Check Form (finds errors), and Empty Cells (deletes everything in a table cell).

TheFormTool PRO splits each document into two sections: the Form and the Q&A Table. The form is the content of the document — except with Fields, Lists, Conditions, Attention Marks, etc.

The Q&A table, located on the last page of the document, contains the definitions of all Fields and Lists. If you don't have a piece of information yet, just enter it later and re-fill the form. You can also re-use forms. For example, to draft succeeding notices, open a previous form, change the dates, re-fill, and Save As. Done in a snap.

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use of TheFormTool PRO.**

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### **DIGGING INTO THE MORE ADVANCED FEATURES**

For beginners, TheFormTool PRO provides a simple interface to create dynamic documents. When you're ready to dive into the advanced features, TheFormTool PRO has an excellent [support forum](#).

If you already have boilerplates, all you need do is add conditionals. Nested Conditionals enable me to combine our various fee agreements into one document because I specified multiple requirements for showing specific text. Definitely save your documents under a different filename before you embark. And save often because a few times when nesting conditionals, I found it easier to start over than undo.

As an example, our Contract For Legal Services paragraphs display if the case matter is not answer choice Number 4 (dissolution) AND if the retainer rate is hourly. You can pick from three options: any of the selected conditions, only one, or none. TheFormTool PRO displays numbers on the form, but the dialog box shows the text that you defined in the Q&A Table.

TheFormTool PRO offers pre-defined conditionals for plural words, pronouns, and counts, which means you don't have to worry about them. For the singular/plural menu, TheFormTool PRO offers 14 preset options in addition to customized formats. In the above agreement example, Case No{s} will appear plural if there is more than one case number.

For text like dates and numbers, TheFormTool PRO offers many different formats, including your own custom formats. In our contract example, we can specify the hourly rate as "One Dollar (\$1.00)" just by changing the format and entering the rate in the Q&A Table once. It also calculates dates.

The Master Lists save me a lot of time as well. TheFormTool PRO makes these user-defined lists available in every document. Use them to add static information such as County to your documents.

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Linked Lists work like Master Lists except that they store dynamic information, which changes per case. If an answer is linked to a list, it cannot itself be a list. I found this disappointing, but workable. Whereas I could never get Word's mergefields to work nicely with formatting, TheFormTool PRO has nary a hiccup.

TheFormTool PRO's Derived Answers enable you to introduce conditionals in your answers in the Q&A table. For example, my {ClientProsecuting} field is derived based on my answer to whether the client is the prosecuting party. If she is, then she is listed first. If not, then the adverse party is listed first.

### **THE LEARNING CURVE, HELP, AND TECHNICAL SUPPORT**

Having coded mergefields previously, I love that TheFormTool PRO does everything for you. For the easy stuff, the learning curve takes minutes. More complicated

tasks, like creating a case caption suitable to copy and paste into every document, evolve over a handful of hours.

TheFormTool PRO shows inline text when you hover over the Q&A Table. For instance, when you choose a list answer type and click in the answer cell, it says “Click Add to AddAnother Item to the List.” Unfortunately, it took me a few tries to determine that it really did mean what it said. The “Add” it referred to is the big, green plus sign that said “Add” in the List submenu.

Hover over any of the buttons and help text will pop up. The TheFormTool PRO team is available by email. However, I usually I head straight to the support forum when I have a question that the Advanced User Manual doesn’t answer.

### WISH LIST

If you haven’t already guessed, I’ve become a fan and daily user

of the TheFormTool PRO. I have four modest wishes though.

1. Add a feature to export field data to Excel.
2. Add an undo button that will undo the entire tool you just used because Word’s undo works only one step at a time. As I noted above, I often find it easier to just start over.
3. Make mergefields play nicely in situations in which address information is required (like on Notices).
4. Sometimes when re-editing a field, the dialog box defaults to a different option than you had specified. It would be nice if it would always load the chosen option.

### TECHNOSCORE

TheFormTool PRO needs just a few more features and a more intuitive interface to become perfect. That said, once you catch onto the basics, everything falls in

line. Derived Answers in particular make it very powerful because you can code a conditional once in an answer instead of several times throughout your form.

The \$89 per user price tag might give a small law firm pause, but not me. I have asked my boss to buy a copy for himself. It costs less than competitors as far as I can tell. For the price, support, community, and features, you can’t ask for much more. Thus, I give the TheFormTool PRO a TechnoScore of A.



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*Jeanette Otis worked in many fields, including journalism, mental health, and AmeriCorps community work, before landing at [Dodds Law Office](#), a personal injury law firm in Bloomington, Illinois. Her writing portfolio secured her current legal assistant position. Someday, she hopes to work in a legal clinic associated with a law school or a civil rights firm. She enjoys creating Excel workbooks to track data, and has a few examples at her web site, [Nnettsplace](#). She also writes for the [Central Illinois Paralegal Association](#).*

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