



# Expert User Guide

Version 2.2

## Highlights

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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 **TheFormTool** file to install the program (either **TheFormTool.docm** or **TheFormToolPRO.docm**).

## 2. Activate it

If you purchased TheFormTool PRO, go to the new TheFormTool tab in Microsoft Word, click  **Options, License Code**, and enter the Registered 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](http://www.video1.theformtool.com)

### 3. Create a form

Open a document or form you've used in the past, and save a copy 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) 2012 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 Quick-Start Guide are available at [www.theformtool.com](http://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.

# Foreword

Although this is a manual that focuses exclusively on forms – how to make them more intelligent, more productive and more useful – this Expert Guide is really all about people.

It's written to help three groups in particular: a form's audience, its creator and its user.

First of all, of course, are the Readers, the form's ultimate audience, those seeking information. In the final analysis, TheFormTool is ultimately about clients and their opposition; judges and court officials; regulators and special interest groups; media and the general public. We hope TheFormTool will improve communication between you and everyone you hope to influence with the written word in a written document environment, whether digital or paper.

This guide is written from the perspective of the Form Creator, the expert who wishes to expand the influence of his or her expertise by making it easier for others to complete a complex form quickly, accurately and as expertly as would the Creator merely by answering a few questions. TheFormTool allows the expert Creator to lay out the exact circumstances where "A" is appropriate, the exceptions where "B" or "C" should apply, and the gray areas where "A" should be modified but not replaced. Since forms are by definition useful in repetitive similar-but-not-identical circumstances, the number of alternatives for consideration and inclusion are finite and therefore manageable by software.

Finally, TheFormTool is designed to make a real difference to the Form Users, the men and women tasked with merging current information into pre-created documents that can at once be simplistic and complex, literal and figurative, static and dynamic. TheFormTool works so well because it uses technology to make the dynamically complex alternatives built into a form simple enough to be exactly, accurately and quickly replicable by non-experts. The expert determines the outcome he or she intends; then the non-expert furnishes the input in one-fifth the time otherwise required.

We invite you to use TheFormTool to give yourself an unfair advantage over your competition by allowing your forms to work intelligently for you. Follow these three steps to a smarter future:

1. "Brilliantize" a few of your forms with TheFormTool, then put them into practice.
2. Use an alternative fee arrangement to hold your revenue constant, and
3. Watch your net earnings mount.

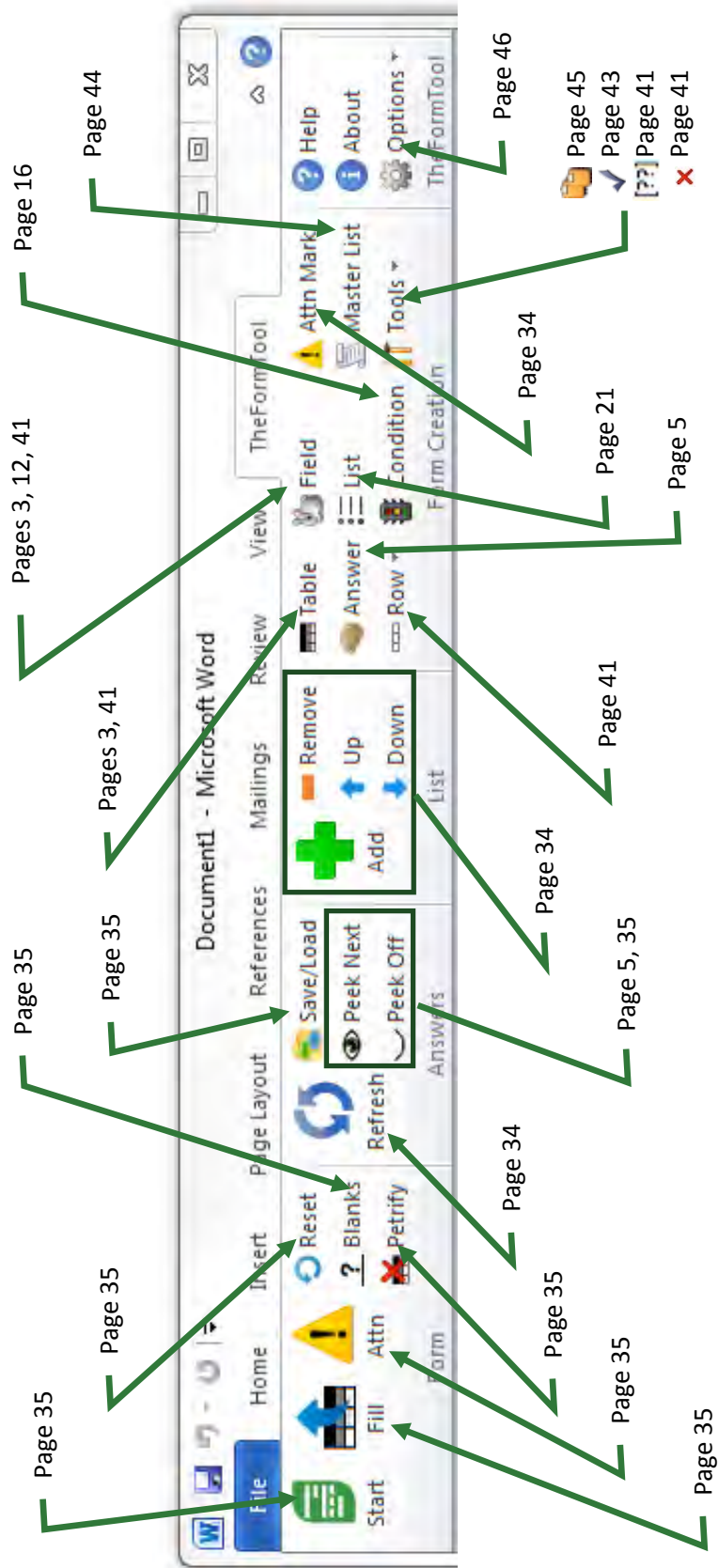
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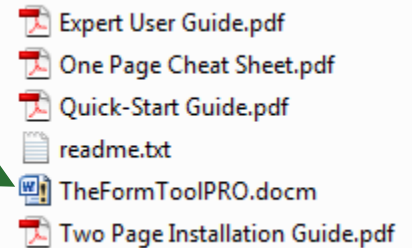
# Meet the Buttons



# Installing TheFormTool

## Step 1: Open the Installation File

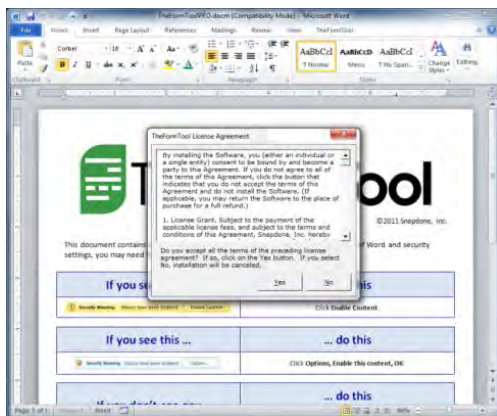
Open the file you downloaded to see its contents. Double-click on  TheFormToolPRO file:



## Step 2: Security Warnings?

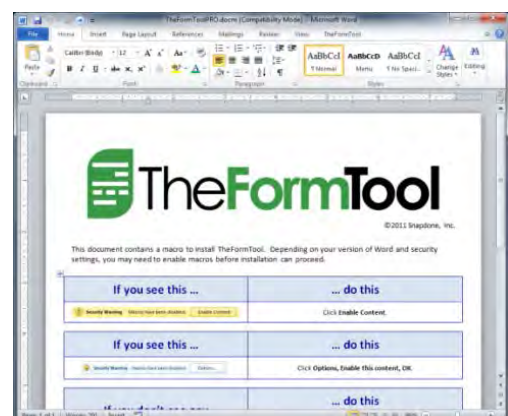
Depending on Windows and MS Word settings, you may need to respond to one or more security warnings before installation can proceed.

If you see this ...



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

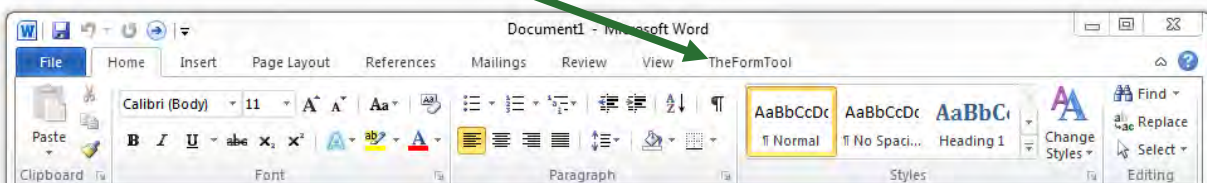
If you see this ...



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. If that doesn't work, please contact us so we can help get you up and running ([support@theformtool.com](mailto:support@theformtool.com)).



## Step 4: Enter License Code

To activate TheFormTool PRO, click  **Options, License code** and enter the registered name and license code we emailed to you. If you need to buy a license, visit [www.upgrade.theformtool.com](http://www.upgrade.theformtool.com). If you've lost your license code, please contact us ([support@theformtool.com](mailto:support@theformtool.com)).

## Step 5: Sharing Information on a Network

If you own multiple licenses for TheFormTool PRO, see Sharing Information on page 47.

## Step 6: Updates

Check [www.updates.theformtool.com](http://www.updates.theformtool.com) periodically for updates to TheFormTool. To be notified when updates are available, subscribe to our newsletter at [www.theformtool.com/newsletter](http://www.theformtool.com/newsletter).

# The Basics

## What's It Do?

Think of the process of filling in a form as a series of questions and answers. The form creator asks a question ("What's the name of the Grantor?"), and the form user answers the question ("Gretel Purcell").

TheFormTool makes it easy for the form creator to ask a series of questions, and easy for the form user to answer those questions.

## Creating a Basic Form

We'll turn this document into a form. If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.

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

Signed: \_\_\_\_\_  
ABIGAIL BENTLEY

### Step 1: Create the Q&A Table

Click  **Table** to add a Q&A table to the end of the form.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer



Fill in the table with a series of questions, and give each question a short label. For example:

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Meet the Q&A Table! Take a moment to get familiar with the three-column layout of the Q&A table. Once you're comfortable with the Label/Question/Answer pattern, guru status is within reach.

## Adding Rows to the Q&A Table

When first creating the Q&A table, add rows just as you would in any other Word table – by pressing **Tab** when your cursor is in the table's last cell.

Later in the process of creating a form, TheFormTool “locks” the Q&A table so form users can't accidentally alter it. But you can still add a row by clicking  **Row**,  **Add**.


## Step 2: Add Fields to the Form

In the body of the form, add fields wherever answers need to be inserted. For example, this form needs three fields.

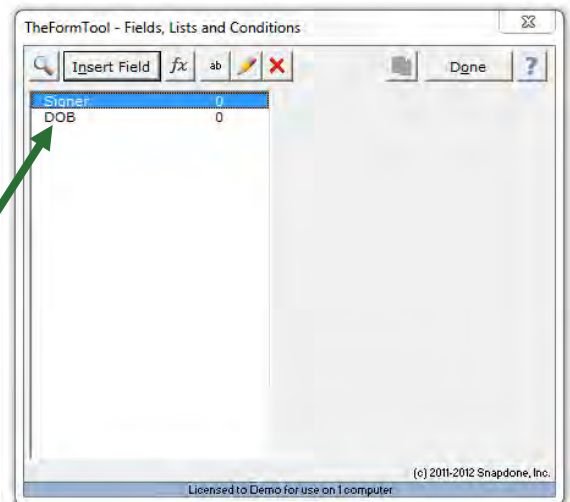
My name is [1]. I was born on [2].

Signed:

[3]

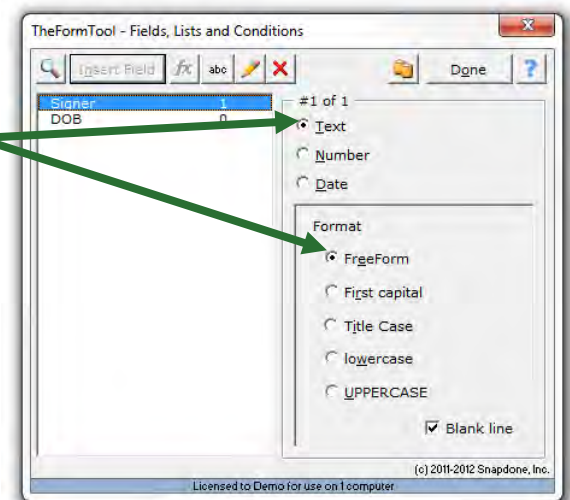
To add a field, place the cursor in the desired location and click  **Field** (yes, it's a friendly Field Bunny) to open this screen.

All the questions in the Q&A table are listed here, using the Labels you provided. In this example, there are only two: **Signer** and **DOB**. Select **Signer** and click **Insert Field**.



Various field formats appear. In this example, the default format is correct (**Text**, **FreeForm**), but sometimes you will choose another format here.

Click **Done** to finish.



Notice that the field you added shows up as a gray bracketed item: {Signer}. Add two more fields to finish the form.


My name is {Signer}. I was born on [2].

Signed:

[3]

### Formatting Fields

The “format” choices above are actually changing the *text* of a field, not the *format* – from **abc** to **ABC**, for example. But you can also apply any type of font formatting to a field, using Word’s ordinary formatting commands – bold, underline, font type, small caps, color and shading, etc.

Insert the second field by clicking  **Field** and selecting **DOB, Date**.

And insert the third field by clicking  **Field** and selecting **Signer, UPPERCASE**.

After adding all three fields, the finished form looks like this. The first field uses **Text, FreeForm** format, the second uses **Date**, and the third uses **Text, UPPERCASE**.

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

Signed:


{SIGNER}

### Meet the Brackets


The gray bracketed items above – {Signer}, {DOB}, and {SIGNER} – will become a familiar sight. They mark where each answer in the Q&A table belongs in the finished document.

Once the novelty wears off, you’ll find yourself comfortably deleting, copying and pasting these bracketed items just as you do other text, sometimes saving a few clicks by copying a field rather than creating it from scratch.

## Using a Basic Form

Open a form and click  **Start** to move to the Q&A table. Answer the questions, like so:

TheFormTool (c) 2012 Snapdone, Inc.		
Label	Question	Answer
Signer	What’s the name of the signer?	Horace Blixt
DOB	What’s the birthdate of the signer?	4/17/60

Then click  **Fill** to fill in the form. Done!

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

Signed:

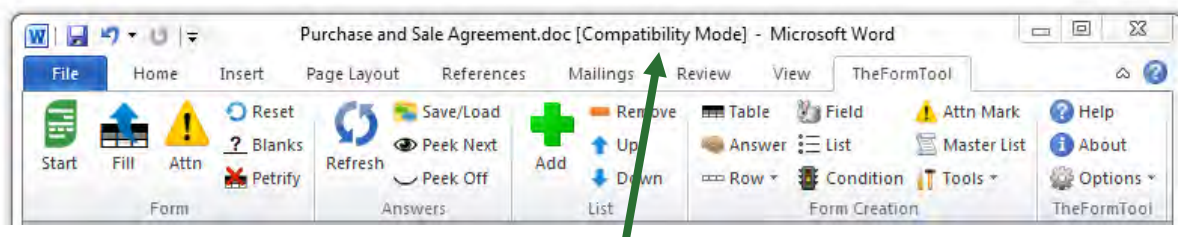
HORACE BLIXT

## 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 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
<ol style="list-style-type: none"><li>1. Click the  <b>Office</b> button (the round button in the top left corner), then click <b>Save As</b>.</li><li>2. In the <b>Save as type</b> box, choose <b>Word Document (.docx)</b> or <b>Word Template (.dotx)</b>.</li><li>3. Near the bottom of the screen, make sure the <b>Maintain compatibility with Word 97-2003</b> checkbox is <b>UNCHECKED</b>.</li><li>4. Click <b>Save</b>.</li></ol>	<ol style="list-style-type: none"><li>1. Click <b>File, Save As</b>.</li><li>2. In the <b>Save as type</b> box, choose <b>Word Document (.docx)</b> or <b>Word Template (.dotx)</b>.</li><li>3. Near the bottom of the screen, make sure the <b>Maintain compatibility with previous versions of Word</b> checkbox is <b>UNCHECKED</b>.</li><li>4. Click <b>Save</b>.</li><li>5. If you <i>still</i> see <b>[Compatibility Mode]</b> at the top of the screen, click <b>File, Info, Convert</b>.</li></ol>

### Documents Versus Templates

As you create forms, you can save them as documents (files that end with **.docx**) or templates (files that end with **.dotx**). TheFormTool 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 new document elsewhere.

As the form creator, though, you will sometimes need to revise the original form. Instead of double-clicking the template file to open it, right-click the file and choose **Open**. This opens the form itself, rather than creating a new document, so you can make changes and save the revised form.

# Creating Smarter Forms

The **FormTool** builds intelligence right into the form, automatically including or removing optional text, changing pronouns and plurals, converting date and number formats, performing math calculations, and more. A single click by the form user can change the entire landscape of the finished document.


## Smart Answers

In the realm of form creation, different types of questions call for different types of answers. You might ask for a yes/no response (“Is the signer a U.S. citizen?”), or you might want to present choices (“In which of these counties is the property located?”), or you might ask for a series of items with a single question (“List all the shareholders.”).

The **FormTool** provides several types of answers, making it easy for the form user to respond correctly and intuitively to every question. To turn a regular answer into a Smart Answer, first place the cursor in an answer box.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Buyer	What's the name of the buyer?	
Seller	What's the name of the seller?	

These are answer boxes – one box for the Buyer question, and another for the Seller question.

To select the answer type for a particular question in the Q&A table, place the cursor in its answer box and click  **Answer** to open the Smart Answer screen.

### Text Answers

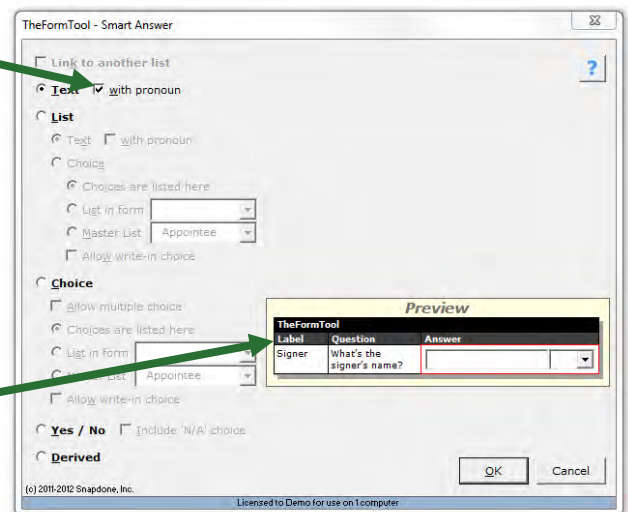
Each answer in the Q&A table begins as a Text answer and stays that way unless you alter it. Text answers are appropriate for questions like: “What’s the signer’s name?” “What’s the docket number?” “What was the date of the injury?”

### Text-With-Pronoun Answers

To include a pronoun box alongside a Text answer, select **with pronoun**.

See Example 1 on page 47 to find out how Pronoun answers can save buckets of time every time a form is used.

(While you’re in this screen, note the arrival of the Preview area. You’ll see many more previews of Smart Answers in the next few pages.)

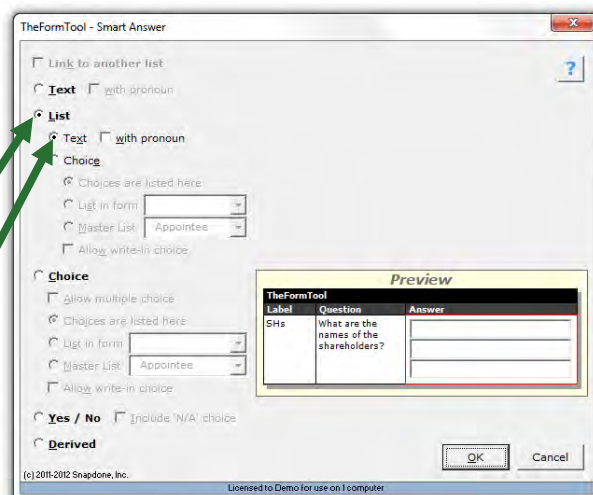


## List Answers


List answers allow the form user to type a series of items in a single answer. List answers are appropriate for questions like: "Who are the will maker's children?" "What are the names of the shareholders?" "Which attorneys are signing this pleading?"

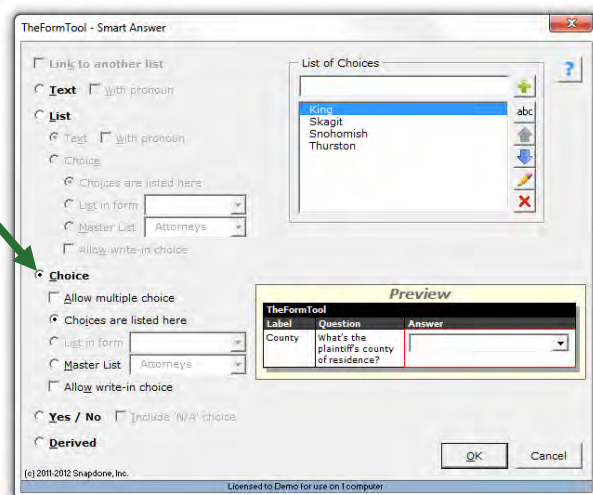
To create a List answer, click  **Answer** and select **List**.

Note that List answers contain a series of items, each of which is an answer-within-an-answer. The items can either be **Text** answers (selected here) or **Choice** answers.



## Choice Answers

To present a series of choices to the form user, click  **Answer** and select **Choice**.








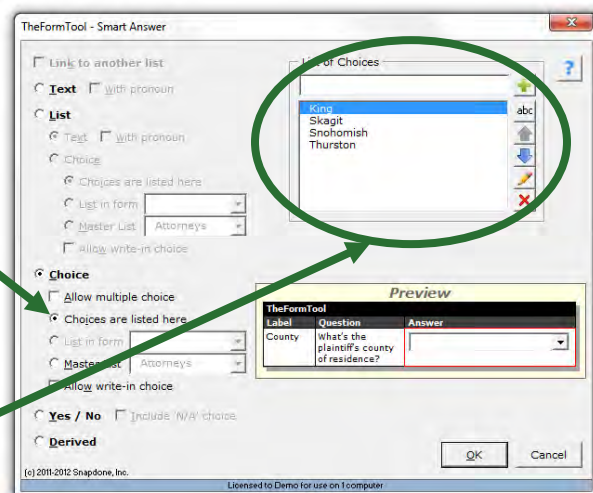
## Source of Choices

Choices are drawn from one of three sources:

### Source One

Select **Choices are listed here** to type the series of choices in the top right corner of the screen.

Click  plus to add an item, **abc** to alphabetize the list,  to remove an item, the  pencil to edit an item, and the   arrows to rearrange items.





## Source Two

Select **List in form** to use a different answer in the Q&A table as the source for a Choice answer.

For example, the Choice answer shown here presents a series of shareholders as choices when answering the question “Who is the President of the company?”

See Example 3 on page 56 for a step-by-step discussion of the **List in form** option (in Excruciating Detail).

TheFormTool - Smart Answer

☐ Link to another list

☐ Text ☐ with pronoun

☐ List

☐ Text ☐ with pronoun

☐ Choice

☐ Choices are listed here

☐ List in form SHs

☐ Master List Appointee

☐ Allow write-in choice

☐ Allow multiple choice

☐ Choices are listed here

☐ List in form SHs

☐ Master List Appointee

☐ Allow write-in choice

☐ Yes / No ☐ Include 'N/A' choice

☐ Derived

Preview

Label	Question	Answer
SHs	List all the shareholders	Tic Tac Toe
President	Who is the President?	Tic Tac Toe

OK Cancel

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## Source Three

You can also use a **Master List** as the source for a Choice answer.

Master Lists are special sets of information shared by all the forms in your office, not just a particular form. For example, you might create a Master List of judges in your jurisdiction, counties in your state, or personnel at your firm.

The example shown here uses a Master List of attorneys as the source for this Choice answer.

TheFormTool - Smart Answer

☐ Link to another list

☐ Text ☐ with pronoun

☐ List

☐ Text ☐ with pronoun

☐ Choice

☐ Choices are listed here

☐ List in form SHs

☐ Master List Atty

☐ Allow write-in choice

☐ Allow multiple choice

☐ Choices are listed here

☐ List in form SHs

☐ Master List Atty

☐ Allow write-in choice

☐ Yes / No ☐ Include 'N/A' choice

☐ Derived

Preview

Label	Question	Answer
Attorney	Which attorney will sign this pleading?	Barry Wolf Robert McMahon Gretel Purcell Herb Blount Ethel Morgan

OK Cancel

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See page 44 to learn how to create Master Lists, and Example 4 on page 59 to use a Master List in a form.

## Single Choice or Multiple Choice

When **Allow multiple choice** is unchecked, the series of choices is presented in a single dropdown box, prompting the form user to select only one item.

In the example shown here, the form user is allowed to choose only one optional clause – either Arbitration, Jurisdiction, or Severability.

TheFormTool - Smart Answer

☐ Link to another list

☐ Text ☐ with pronoun

☐ List

☐ Text ☐ with pronoun

☐ Choice

☐ Choices are listed here

☐ List in form SHs

☐ Master List Appointee

☐ Allow write-in choice

☐ Allow multiple choice

☐ Choices are listed here

☐ List in form SHs

☐ Master List Appointee

☐ Allow write-in choice

☐ Yes / No ☐ Include 'N/A' choice

☐ Derived

List of Choices

Arbitration  
Jurisdiction  
Severability

Preview

Label	Question	Answer
Clause	Which clause should be included?	Arbitration Jurisdiction Severability

OK Cancel

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When **Allow multiple choice** is checked, the series of choices is presented as a stack of checkboxes, so the form user is able to select more than one item.

In the example shown here, the form user is allowed to choose zero, one, two, or three optional clauses.

TheFormTool - Smart Answer

☐ Link to another list

☐ Text ☐ with pronoun

☐ List

☐ Choice

☒ Allow multiple choice

Choices are listed here

List in form: SHs

Master List: Appointee

☐ Allow write-in choice

List of Choices

- Arbitration
- Jurisdiction
- Severability

Preview

TheFormTool	Question	Answer
Clause	Which clauses should be included?	<input type="checkbox"/> Arbitration <input type="checkbox"/> Jurisdiction <input type="checkbox"/> Severability

OK Cancel

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## Write-In Choices

When **Allow write-in choice** is unchecked, the form user is required to select an item from the series of choices presented.

So in this example the form user must select one of the attorneys shown.

If **Allow write-in choice** were checked, the form user would be allowed to type an attorney name that's not shown here.

TheFormTool - Smart Answer

☐ Link to another list

☐ Text ☐ with pronoun

☐ List

☐ Choice

☐ Allow multiple choice

Choices are listed here

List in form: SHs

Master List: Atty

☐ Allow write-in choice

List of Choices

- Barry Wolf
- Robert McMahon
- Gretel Purcell
- Herb Blount
- Eshel Morgan

Preview

TheFormTool	Question	Answer
Attorney	Which attorney will sign this pleading?	<input type="text"/>

OK Cancel

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## Yes/No Answers

Select **Yes/No** when asking for a yes-or-no response: "Is the will maker married?" "Is the employee a U.S. citizen?"

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

TheFormTool - Smart Answer

☐ Link to another list

☐ Text ☐ with pronoun

☐ List

☐ Choice

☐ Allow multiple choice

Choices are listed here

List in form: SHs

Master List: Appointee

☐ Allow write-in choice

☒ Yes / No ☐ Include 'N/A' choice

List of Choices

- Yes
- No

Preview

TheFormTool	Question	Answer
Citizen	Is the employee a U.S. citizen?	<input type="text"/>



OK Cancel

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## Derived Answers

Derived Answers are automatically derived from other answers, requiring no additional input. For example, if an answer provides the signer's birthdate, then a Derived Answer could perform a calculation to determine the signer's age.



Since Derived Answers work automatically in the background, they can be hidden from form users: after you've finished creating the Q&A table, click  **Row**,  **Show/Hide** to hide all Derived Answers. (And to revise Derived Answers later, click the same button again to make them visible.)

In a Derived Answer, the answer box becomes the form creator's private workspace to perform complex calculations behind the scenes. This is useful for:

**Conditions based on the results of math formulae, date offsets, or other conditions.** Given a person's birthdate, a Derived Answer can use date and math functions to calculate the person's age. That age can then be used as the basis for conditional text in the form that refers to the person as either an adult or a minor. Example 10a on page 96 walks through this example step by step.

**Improved readability.** If the complexity of a particular passage makes a form difficult to read, it can be tucked away in a Derived Answer out of the form user's view.

**Faster processing.** Use a Derived Answers to perform complex calculations once instead of repeatedly. For example, given a list of shareholders and the number of shares held by each, TheFormTool is able to determine the name of the largest shareholder. If that name appears many times in the form, put the calculation in a Derived Answer with the label LargestSH, then use simple LargestSH fields wherever needed in the form, rather than repeating the whole calculation each time.

Use any combination of text, fields, math formulae, date offsets, lists, and conditions in the answer box of a Derived Answer, then remember to hide it before saving the form (click  **Row**,  **Show/Hide**).

## Linked List Answers

Select **Link to another list** to ask for additional information about each item in an earlier List answer. For example, after asking for the signer's children, you might ask for the birthdate of each child.

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


Linked Lists are used in Example 6a (page 70) and Example 8 (page 77).

## Default Answers

To save typing for the form user, provide default answers whenever practical. For example, if your office is in Washington State, it's helpful to partially pre-fill the Q&A table as shown below – the form user can always type a different state if necessary.

TheFormTool (c) 2012 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	
State	What's the signer's state of residence?	Washington

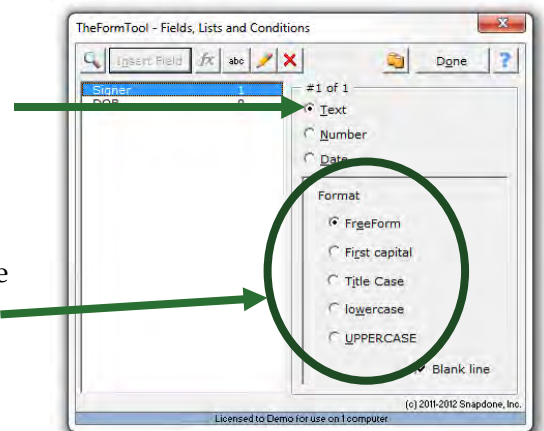
## Field Types

Several types of fields are available when creating forms. Each type has its own set of formatting options, so a single answer in the Q&A table can be used many different ways throughout the form. To insert a field in a form, place the cursor where the field belongs, click  **Field**, select the desired field, and click **Insert Field**.

## Text Fields

**Text** fields are the most common type. Use the five Format options (circled here) to control how each field is capitalized in the document.

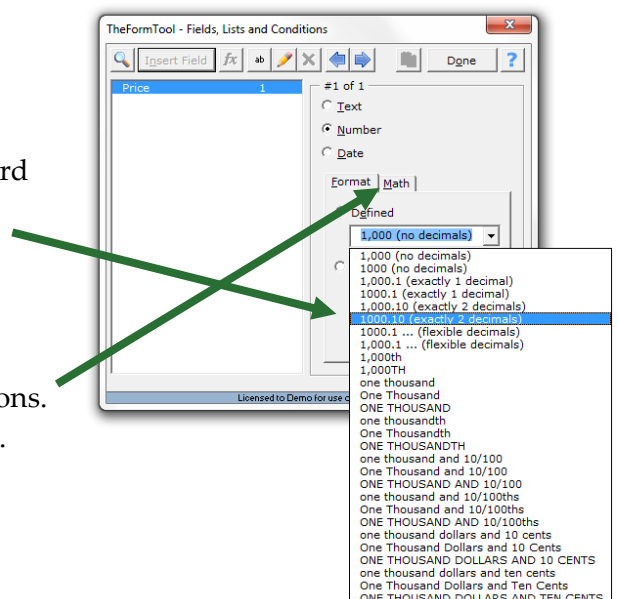
Choose **FreeForm** to capitalize text exactly as it was typed in the Q&A table, or one of the other formats to enforce a particular type of capitalization: **First capital**, **Title Case**, **lowercase**, or **UPPERCASE**.



## Number Fields

As this dropdown box shows, **Number** fields can be formatted as numerals with or without commas and with various numbers of decimal places, as ordinals (1st, 2nd, 3rd ...), or as upper- or lowercase words (One, two, THREE), ordinal words (first, second, third), or dollar amounts in several formats (such as Three Dollars and 38 cents).

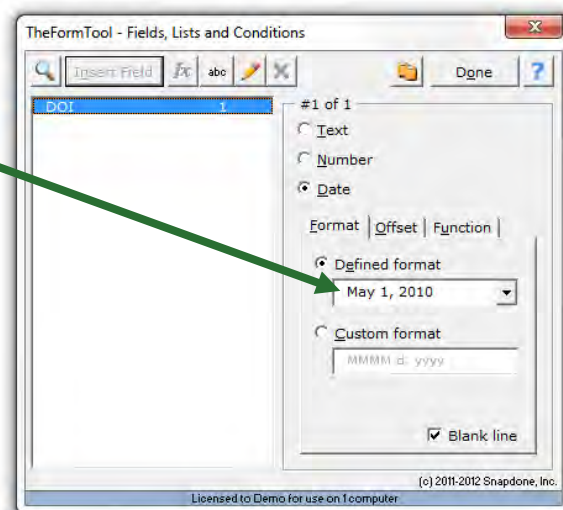
Number fields can be further automated with math functions. Click **Math** to open the Math screen, discussed on page 25.



## Date Fields

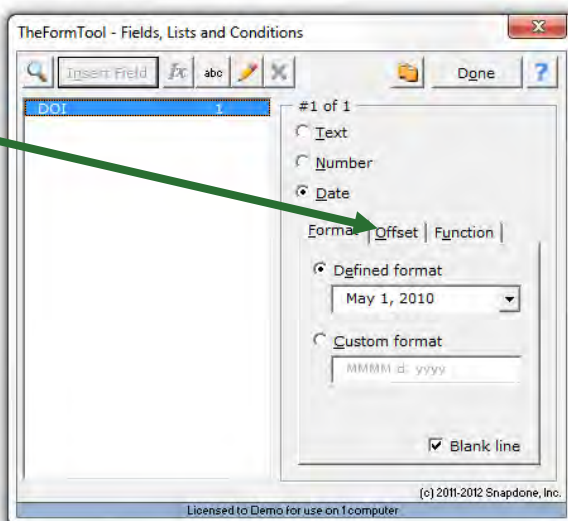
### Date Format

**Date** fields can also be formatted many, many ways, using both words and numbers. You may even choose to display only a portion of the date that's typed into a Q&A table, like the name of the month or day of the week.



### Date Offset

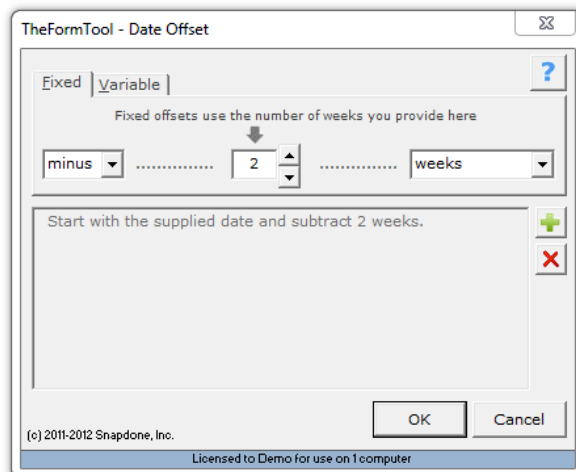
Date fields can be further manipulated with Date Offsets. Click **Offset** to open the Date Offset screen.



In this screen, related dates can be calculated from a date typed in the Q&A table by the form user.

For example, the Q&A table might ask for a trial date, and the form could calculate several other dates, such as a meeting scheduled two weeks before trial, or a phone call scheduled for the weekday preceding trial.

See Example 5 on page 62 for details on fixed and variable Date Offsets.

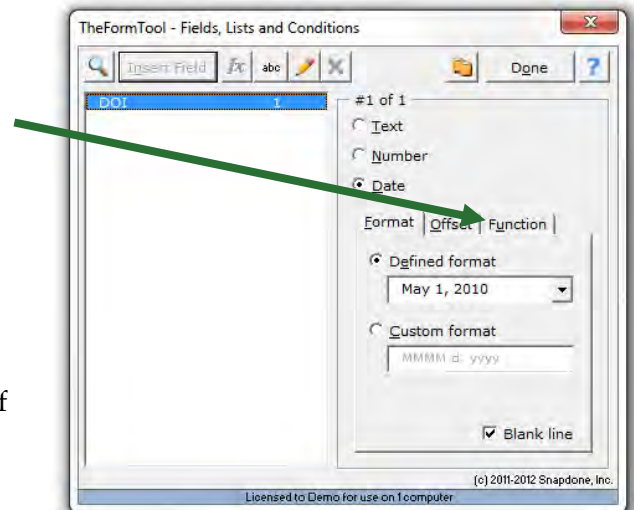


## Date Function

TheFormTool includes several date functions that are not offsets: FirstDate, LastDate, ListFirstDate, ListLastDate, and Now. To use one of these functions, click **Function** to open the Math screen.

See page 25 for a full discussion of the Math screen.

You may assign both a function and an offset to a Date field. The offset will be applied to the result of the function.

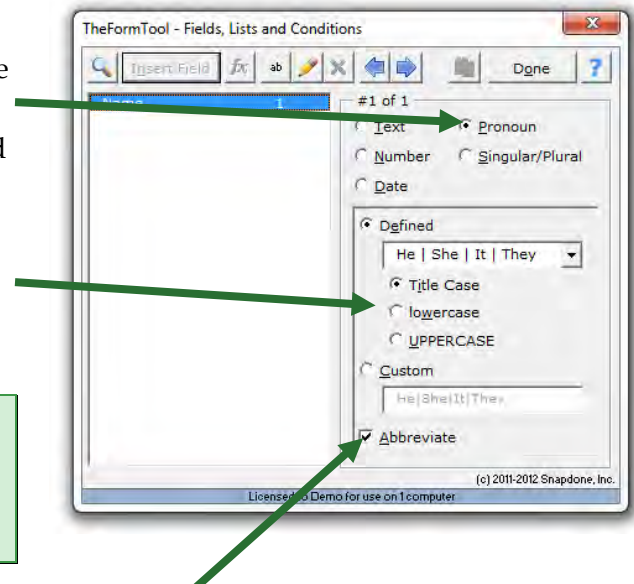


## Pronoun Fields (Got Grammar?)

**Pronoun** fields automatically choose the proper word based on a pronoun choice by the form user – words like “he/she” and “him/her”. They also automate gender-related words like “husband/wife”, “son/daughter”, and “testator/testatrix”.

As you place fields in a form, select **Title Case** for pronouns at the beginning of a sentence, **lowercase** for pronouns in the middle of a sentence, or **UPPERCASE** when needed.

**TOOL TIP:** If you don't see the **Pronoun** option in this screen, add a pronoun to this question's answer box in the Q&A table (see “Text-With-Pronoun Answers” on page 7).



The **Abbreviate** checkbox has no effect on finished documents, but improves form readability by contracting four-part fields (like “he/she/it/they” or “husband/wife/spouse/spouses”) to show only two parts (“he/she” or “husband/wife”). If you prefer to see all four parts displayed in your form, turn off this checkbox.

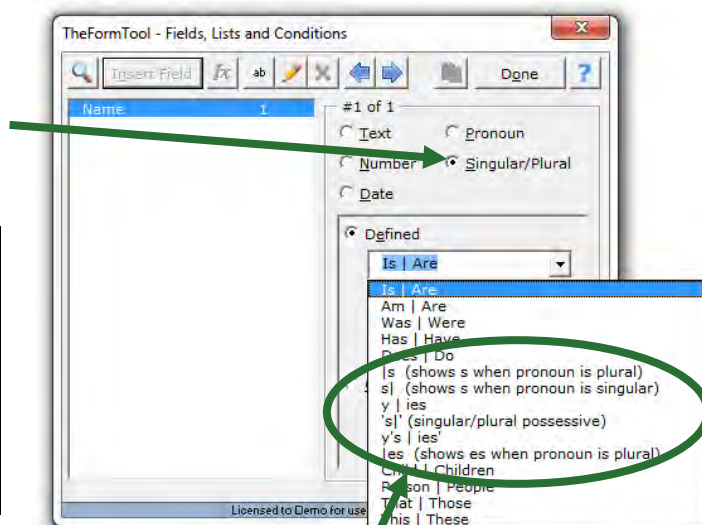
Excruciatingly Detailed Example #1 on page 47 shows how Pronoun fields provide truly impressive time savings for the form user.



## Singular/Plural Fields

**Singular/Plural** fields automatically choose the proper word depending on (1) which pronoun is selected in a Pronoun answer; (2) how many items appear in a List answer; or (3) how many items are selected in a multiple-choice answer.

**TOOL TIP:** If you don't see the **Singular/Plural** option in this screen, change this question's answer box in the Q&A table to a Pronoun answer ("Text-With-Pronoun Answers" on page 7), List answer ("List Answers" on page 8), or multiple-choice answer ("Single Choice or Multiple Choice" on page 9).



Word pairs like "is/are" and "was/were" are great when a specific word is needed, but the options shown here and described below are flexible enough to be used in lots of different situations.

Is (shows s when pronoun is plural)  
s| (shows s when pronoun is singular)  
y | ies  
's|' (singular/plural possessive)  
y's | ies'  
es (shows es when pronoun is plural)

**|s (shows s when pronoun is plural):** Use this field to tack an "s" onto the end of any word (usually a noun) when the answer is plural – for example, after "defendant" in this form.

The defendant{s} allege{s} as follows...

**s| (shows s when pronoun is singular):** Use this field to tack an "s" onto the end of any word (usually a verb) when the answer is singular – for example, after "allege" in this form.

These facts are agreed upon by the above-named part{ies}.

**y|ies:** Use this field at the end of words that end with Y, as shown here.

The defendant{s}'{s} rights have been violated.

**s|' (singular/plural possessive):** Use this field at the end of a word to form a possessive. The example shown here uses two Singular/Plural fields – the first shows an s when the pronoun is plural, and the second shows either ' or 's. This results in "The defendant's rights..." when there is one defendant, or "The defendants' rights..." for multiple defendants.

The above-named part{ies}' rights have been violated.

**y's|ies':** Use this field at the end of words that end with Y to form a possessive, as shown here.

The contract breach{es} identified below.

**|es (shows es when pronoun is plural):** Use this field to tack an "es" onto the end of any word when the answer is plural.

Example 1 on page 47 shows Singular/Plural fields in action. It's a page turner.

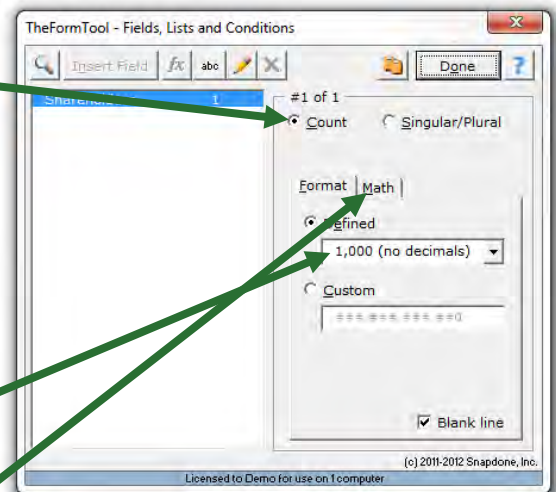
## Count Fields

**Count** fields refer to the number of items in a List answer (“The company has three shareholders” or “I have one child”) or the number of items selected in a multiple-choice answer.

**TOOL TIP:** If you don’t see the **Count** option in this screen, change this question’s answer box in the Q&A table to a List answer (“List Answers” on page 8) or multiple-choice answer (“Single Choice or Multiple Choice” on page 9).

Count fields can be formatted as numbers, words, or ordinals, in upper- or lowercase.

Count fields can be further automated with math functions. Click **Math** to open the Math screen, discussed on page 25.

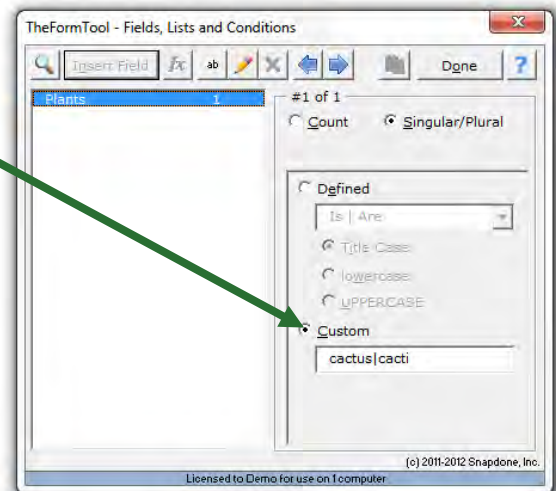


## Custom Field Formats

On rare occasions, you may want to create your own custom field format. For example, plurals of most words can be created with the built-in Singular/Plural fields described above, but you could also create your own custom Singular/Plural fields for unusual word pairs like “index/indices” or “cactus/cacti” as the need arises.

To create a custom field, select **Custom** and edit the contents of the Custom box.

This example shows a custom Singular/Plural field, but you may also create custom formats for Number fields, Date fields, and Pronoun fields.



## Conditions

### Conditional Text

Conditions are the intelligent worker bees of the form world. The form creator makes some decisions about how a form should work, and then adds Conditions to automatically implement those decisions each time the form is used.

Use Conditions to include or exclude text depending on the form user’s response to a question in the Q&A table. The conditional text can be a word, phrase, paragraph, or even multiple paragraphs or pages. Lots

of conditions can be tied to one response, causing the finished document to change dramatically based on a single mouse click by the form user.

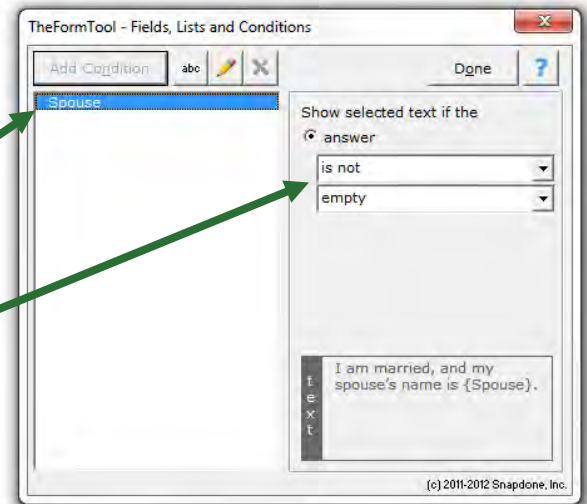
For example, consider this form.

My name is {Signer}. I am married, and my spouse's name is {Spouse}.

If the signer is not married, then the second sentence should be removed. In other words, the second sentence should be conditional, depending on whether or not the answer to the Spouse question is empty.

To accomplish that, you would:

1. Select the conditional text (the second sentence).
2. Click **Condition** to create a condition.
3. Select the Spouse answer, since the condition depends on that response, and click **Insert Condition**.
4. Choose to show the selected text if the answer **is not empty**.
5. Click **Done**.



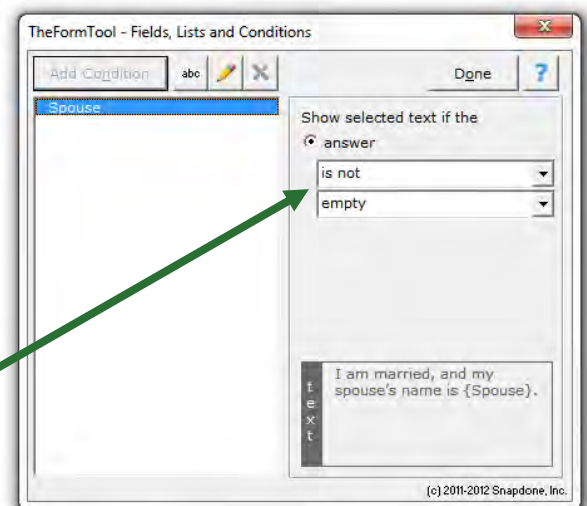
The resulting form looks like this. The beginning of the conditional text is indicated with {Spouse<>[empty]}, and the end is marked with }. Everything in between will be included in the finished document only if the condition is met.

My name is {Signer}. {Spouse<>[empty]}I am married, and my spouse's name is {Spouse}.

(We covered this form briefly here, but it is also the subject of Excruciatingly Detailed Example 2 on page 53, in case you'd like to take a closer look.)

The appearance of the Condition screen varies depending on what type of answer is selected.

**Conditions based on Text answers** can depend on all sorts of criteria. The one shown here checks to see if the answer is empty, but you can create conditions that check whether or not an answer starts with "Fred", ends with "x", contains "pop", or equals "Lilith"; whether it's a number less than 38 or more than 16, whether it's a date earlier or later than May 11, 2012; whether it's alphabetically before "possum" or after "flan" – take a minute to experiment with the two drop-down boxes to see the endless possibilities.



You can even compare two answers. In this example, the selected sentence will be included in the finished document only if the answer to the Payment question is less than the answer to the Minimum question.

The screenshot shows the 'TheFormTool - Fields, Lists and Conditions' window. On the left, a list of fields includes 'Payment' and 'Minimum'. The 'Payment' field is selected. On the right, the 'Show selected text if the' section has 'answer' selected. Below this, a dropdown menu shows 'is less than'. Underneath, 'this number:' is followed by a dropdown menu showing '{Minimum}'. A text box at the bottom contains the sentence: 'The submitted payment does not meet the minimum payment requirement.' A green arrow points from the text in the first block to the 'is less than' dropdown, and another green arrow points from the same text to the text box.

**Conditions based on Text-With-Pronoun answers** include all the possibilities of Text answers shown above, plus some additional options that depend on the selected pronoun.

In this example, the selected sentence will be included in the finished document only if the Seller is an "it".

The screenshot shows the 'TheFormTool - Fields, Lists and Conditions' window. On the left, a list of fields includes 'Seller'. The 'Seller' field is selected. On the right, the 'Show selected text if the' section has 'pronoun' selected. Below this, there are two radio buttons: 'is any of these' and 'is none of these'. The 'is any of these' radio button is selected. To the right of these radio buttons is a list of pronouns: 'he', 'she', 'it', and 'they'. The 'it' pronoun is selected. A text box at the bottom contains the sentence: 'The Seller is a corporate entity.' A green arrow points from the text in the second block to the 'is any of these' radio button, and another green arrow points from the same text to the text box.

**Conditions based on List answers** depend on the number of items in the List.

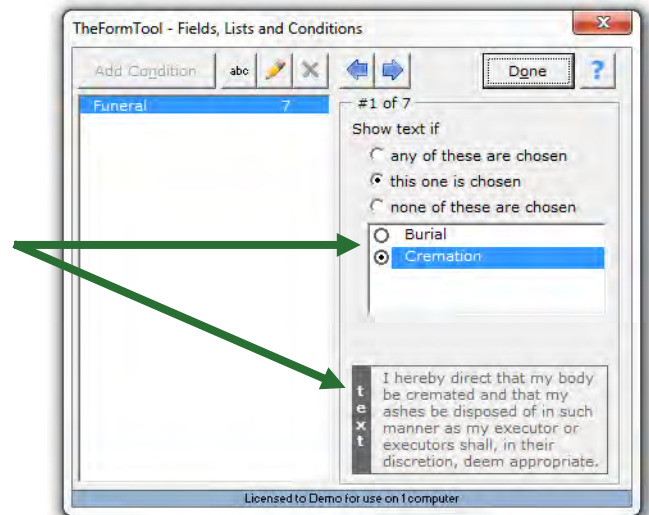
In this example, the selected sentence will be included in the finished document only if there is exactly 1 shareholder.

The screenshot shows the 'TheFormTool - Fields, Lists and Conditions' window. On the left, a list of fields includes 'Shareholders'. The 'Shareholders' field is selected. On the right, the 'Show text if the list contains' section has a dropdown menu showing 'exactly'. To the right of this dropdown is a text box showing '1 item'. A text box at the bottom contains the sentence: 'The company is entirely owned by a single shareholder.' A green arrow points from the text in the third block to the 'exactly' dropdown, and another green arrow points from the same text to the text box.



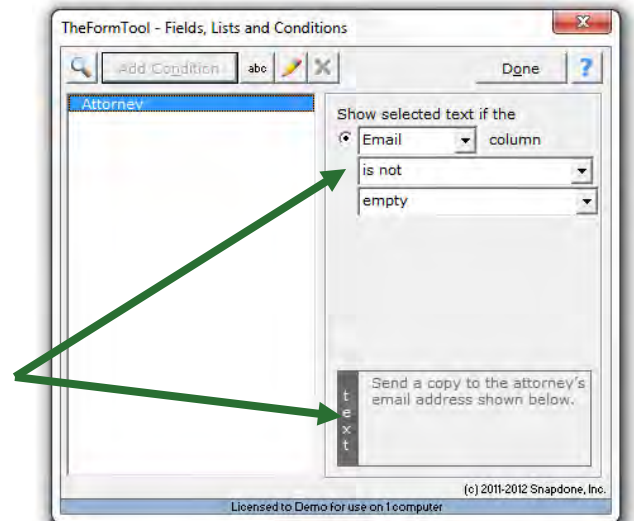
**Conditions based on Choice answers** depend on the choice that is made.

In this example, the selected sentence will be included in the finished document only if Cremation is chosen.



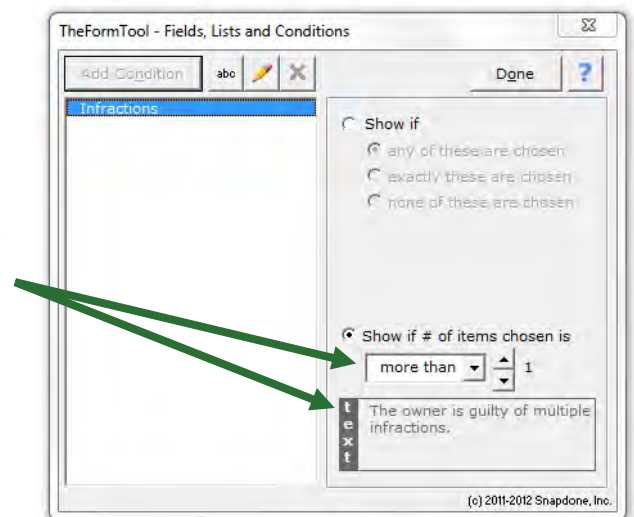
If the Choice answer uses a Master List as the source of its choices, you can select any column of the Master List to be used in the condition.

In this example, the selected sentence will be included in the finished document only if an email address for the selected attorney is provided in the Email column of the Master List of attorneys.



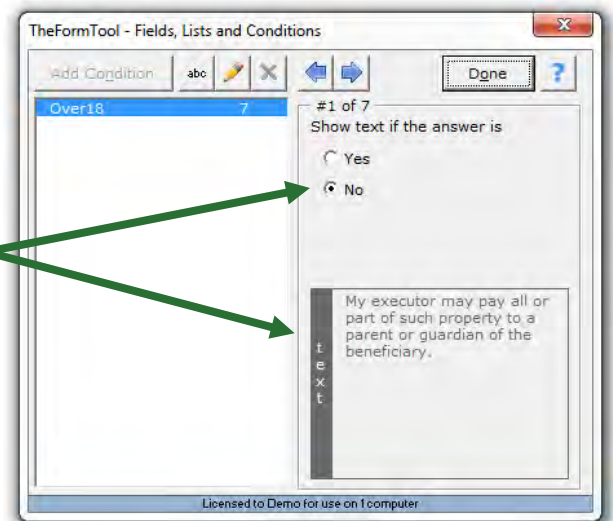
If the Choice answer allows multiple-choices, conditions can also depend on how many choices are selected.

In this example, the selected sentence will be included in the finished document only if more than one infraction is selected.



**Conditions based on Yes/No answers** depend on the form user's response.

In this example, the selected sentence will be included in the finished document only if the beneficiary is under 18 years of age.



## Nested Conditions

Conditions can be nested inside other conditions. You might create an agreement form in which Article III is optional, contained within one great big Condition. Within that article, several paragraphs might also be conditional, either as a group or individually. And within each of those paragraphs other conditions may apply. There is no limit to how deeply conditions may be nested.

## Conditional A/An and Period

The **FormTool** also includes two special conditional fields: **a/an** and **period**. Consider the sentence shown here.

The company is a {State} corporation named {Company}.


If the state is "Texas" and the company is "Acme", the resulting document looks like this – no problems.

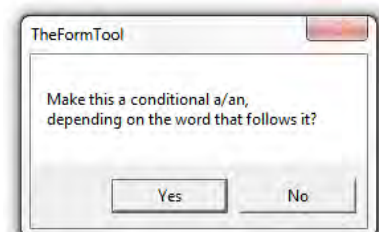
The company is a Texas corporation named Acme.


But if the state is "Idaho" and the company is "Acme, Inc.", the resulting document looks like this.

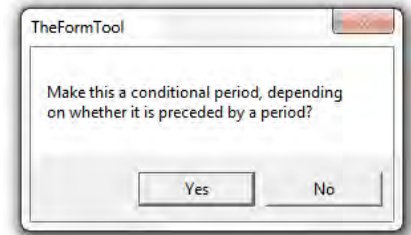
Problems! The "a" should be "an", and one of the two periods at the end of the sentence should be removed.

The company is a Idaho corporation named Acme, Inc..

To solve these problems, first select the word "a" in the form, click  **Condition**, and click **Yes**.



Then select the period at the end of the sentence, click  **Condition**, and click **Yes**.



When finished, the form looks like this. The **a/an** and **period** conditions respond appropriately in all situations. And we all breathe a collective sigh of relief.

The company is {a} {State} corporation named {Company}{.}


## Conditional Row in Table

When a form includes tables, you may want to remove an entire table row under certain conditions. For example, in this form the Tax and Subtotal rows should be removed when tax is equal to 0.

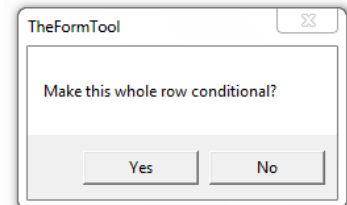
Your purchases are:

Item	Price
Widgets	
Thingies	
SUBTOTAL:	
Tax	
TOTAL:	

Thank you for shopping with us.

To make the Subtotal row conditional, place the cursor anywhere in that row (but don't select any text) and click  **Condition**.

Click **Yes** to open the Condition screen, and create the Condition as you ordinarily would.



When finished, a RemoveRow marker is added to the form, as shown here.

Your purchases are:




Item	Price
Widgets	
Thingies	
SUBTOTAL:	
{Tax=0:[RemoveRow]}	
Tax	
TOTAL:	

Thank you for shopping with us.

Since the Tax row is also conditional, add the same condition to it.  
(Or just copy the first marker and paste it into the Tax row.)


Your purchases are:	
Item	Price
Widgets	
Thingies	
SUBTOTAL:	
{Tax=0:[RemoveRow]}	
Tax	
{Tax=0:[RemoveRow]}	
TOTAL:	

Thank you for shopping with us.

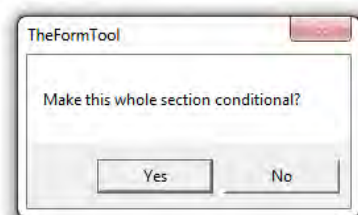
Unlike other Conditions that are fully processed during the  **Fill** step, conditional rows are merely marked for deletion and are not removed from the document until it is finalized with the  **Petrify** command. A message notifies form users of this requirement at the end of the  **Fill** step.



## Conditional Section in Document

When a form is divided into sections using Word's Section Break feature, you may want to remove an entire section under certain conditions.

To make a section conditional, place the cursor anywhere in that section (but not in a table, and don't select any text) and click  **Condition**.



Click **Yes** to open the Condition screen, and create the Condition as you ordinarily would. A RemoveSection marker is added to the form, similar to the RemoveRow marker described above.



Like conditional rows (described above), conditional sections are merely marked for deletion during the  **Fill** step and are not removed from the document until it is finalized with the  **Petrify** command.

## Lists

### The Difference Between Fields and Lists

When inserting information from a List-type answer into a form, it makes a big difference whether you click  **Field** or  **List**. Fields provide *information about the list* (e.g., the number of shareholders); and Lists provide the *contents of the list* (e.g., the name of each shareholder).

For example, to turn this sentence into a form you would create a Q&A table with just one question, using a List-type answer:

I have three children: Sue, Tom, and Mary.

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Label	Question	Answer
Kids	List all the children.	[??] [??] [??]

Then insert a Field in the form to provide the number of children (*information about the list*).

I have {#} children: Sue, Tom, and Mary.

And insert a List to provide the names of the children (*contents of the list*).

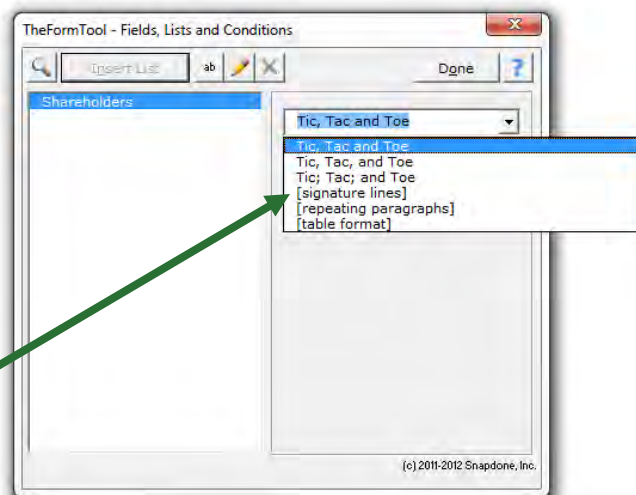
I have {#} children: {List:{Kids#X}}, {Kids#X} and {Kids#X}.

## Inserting a List

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

**TOOL TIP:** Only List answers are shown in this screen. If the answer you want is missing, change this question's answer box in the Q&A table to a List answer (see "List Answers" on page 8).

Select one of the built-in List formats in the dropdown box and click **Done**. The formats are shown below.



**Tic, Tac and Toe** creates a narrative list separated by commas, without a comma before the last item.

Griselda Pugh, Horace Blixt, Eunice Brimley and Bertrand Guff

**Tic, Tac, and Toe** creates a narrative list separated by commas, with a comma before the last item.

Griselda Pugh, Horace Blixt, Eunice Brimley, and Bertrand Guff

**Tic; Tac; and Toe** creates a narrative list separated by semicolons.

Griselda Pugh; Horace Blixt; Eunice Brimley; and Bertrand Guff

The **[signature lines]** format is a handy way to create tidy signatures for a list of people.

\_\_\_\_\_  
Griselda Pugh  
\_\_\_\_\_  
Horace Blixt  
\_\_\_\_\_  
Eunice Brimley  
\_\_\_\_\_  
Bertrand Guff

The **[repeating paragraphs]** format repeats a paragraph for each item in a list.

Sample paragraph about Griselda Pugh.  
Sample paragraph about Horace Blixt.  
Sample paragraph about Eunice Brimley.  
Sample paragraph about Bertrand Guff.

Choose **[table format]** to arrange list items in a Word table.

Choose the number of **Columns** in the table.

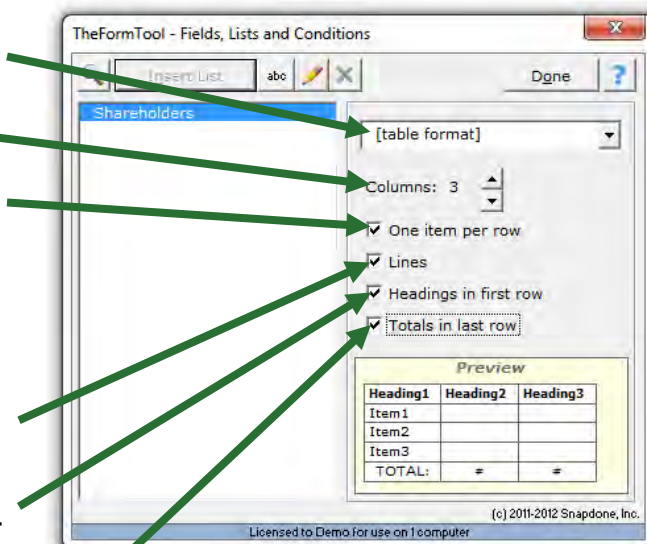
If **One item per row** is checked, each list item appears in the left column, and the remaining columns can be used for other information (works great with linked lists – see “Linked List Answers” on page 11). If unchecked, items flow from left to right, filling each column in the table.

The **Lines** checkbox determines whether border lines are used in the table.

Turn on **Headings in first row** to include headings for each column in the table.

Turn on **Totals in last row** to create an additional row under the list items that automatically generates totals for each column (but only if the column contains a list of numbers).

After adding a table-formatted list to a form, you can further customize the table – type your own headings, remove totals from columns where they don’t apply, add shading or other formatting, etc. In fact, you can customize any of the list formats shown above to fit your exact needs. See Example 6 on page 65 for step-by-step instructions on customizing lists in general, and Example 8 on page 77 for a custom list that includes (brace yourself) linked lists, repeating paragraphs, and math fields.



## Math

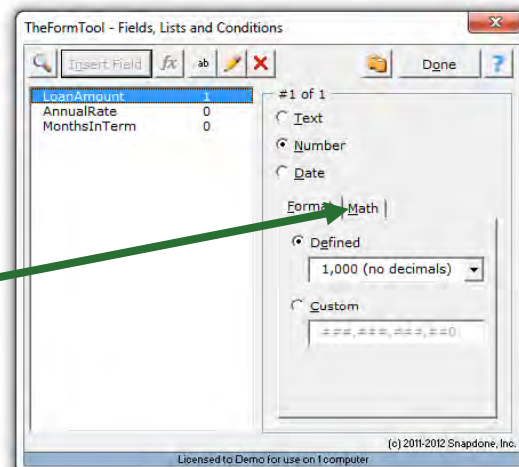
The**FormTool** includes math functions to perform calculations automatically. For example, given a list of shareholders and the number of shares held by each, the form can calculate the total number of outstanding shares and the percentage of the company owned by each shareholder. The math feature is described below, and Example 7 on page 77 gives a step-by-step walkthrough.

### Adding Math to a Field

#### Number and Count Fields


Begin by creating a Number field (page 12) or a Count field (page 16). Or, to add math to a Number or Count field that already exists, begin by selecting the field and clicking **Field**.

Then click **Math** to open the Math screen.

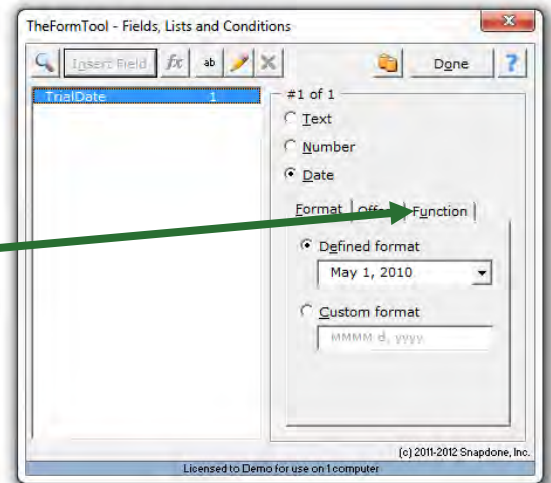




## Date Fields

Begin by creating a Date field (page 13). Or, to add math functions to a Date field that already exists, begin by selecting the field and clicking  **Field**.

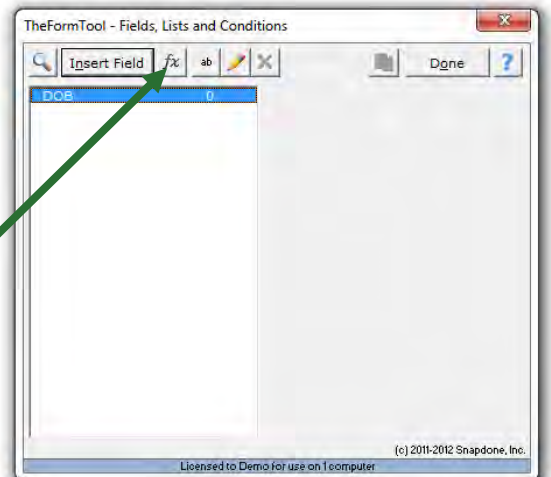
Then click **Function** to open the Math screen.



## Other Fields


You may occasionally want to add a math function that is not related to one particular field. Maybe it involves several fields (e.g., multiplying a purchase price by a sales tax rate) or no fields at all (e.g., the Now function).

Rather than inserting a field and then adding math to it, you can skip straight to the Math screen by clicking **fx**.



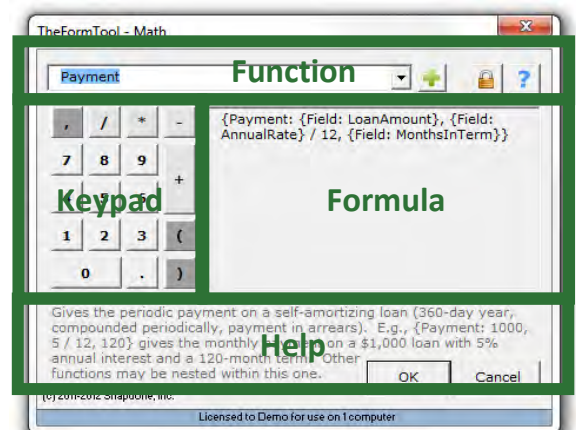
## The Math Screen


**Formula.** Build your math formula here. The formula can as simple as  $1 + 2$  or might contain functions within functions within functions.

**Function.** Functions perform special math duties, like **Days** to count the number of days between two dates, or **Round** to round off a number. To add a function to the formula, select it from the dropdown menu and click  plus.

**Keypad.** Click these buttons to add numbers and operators (plus, minus, etc.) to the formula. You may also type numbers and symbols on your keyboard. Use  $*$  for multiplication and  $/$  for division.


**Help.** This area describes the currently selected function and gives pointers on its use.



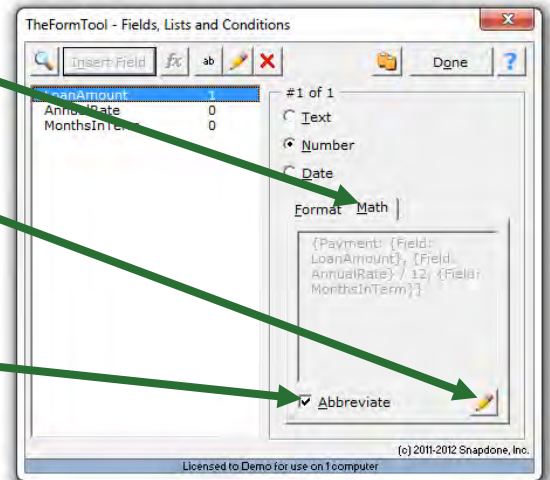
**Unlocking.** Click the  unlock button in the top right corner to turn on freeform editing mode. Expert users may find this mode more convenient so they can type the formula directly (or copy and paste from another source) rather than selecting functions from a menu.

## The Math Tab

After a formula is created in the Math screen, it appears here on the Math tab (or the Function tab for Date fields).

Click the  pencil to return to the Math screen if more editing is needed.

The **Abbreviate** checkbox has no effect on finished documents, but improves form readability by displaying **{###}** instead of the full formula.



### What's With All the Curly Braces?

You may have noticed that math formulae contain lots of curly braces: **{ }**. They show where each math function begins and ends. But you don't need to worry about typing the curly braces – they are automatically included each time you add a function to the formula.

## Math Functions

Math mavens read on for a complete catalog of TheFormTool's math functions. (Those of us who napped through Algebra might want to skip this bit.)

### Add, Subtract, Multiply, Divide

Symbols for basic math are just as you expect:

- + Addition. For example:  $5 + 2 = 7$ .
- Subtraction. For example:  $5 - 2 = 3$ .
- \* Multiplication. For example:  $5 * 2 = 10$ .
- / Division. For example:  $5 / 2 = 2.5$
- ( ) Parentheses control the order of operations. For example:  $(1 + 2) * 3 = 9$ ; and  $1 + (2 * 3) = 7$ .

### Dates Are Not Numbers

You might be tempted to use addition and subtraction to calculate date offsets, but don't – the result would be a "MATH ERROR" message. Instead, use Date Offsets (page 13), which are waaaay more flexible than + and -.



## Absolute

The **Absolute** function gives the absolute value of a number, turning negative numbers into positive numbers. For example, **{Absolute: -3.8} = 3.8**. Other functions may be nested within this one. For example, if the Q&A table asks for PriceA and PriceB, the difference between the two prices is **{Absolute: {Field: PriceA} - {Field: PriceB}}**.

**In the Formula**  
**{Absolute: *number*}**

**Plain English**  
The absolute value of a number

## Constant

The **Constant** function gives one of two math constants (*e* or *pi*), accurate to the 14th decimal place.

**In the Formula**  
**{Constant: *name*}**

**Plain English**  
A mathematical constant

## Days

The **Days** function gives the number of days between two dates. For example, **{Days: 1/31/2011, 2/3/2011} = 3**. Dates should use month/day/year format; both two-digit and four-digit years are allowed. If date1 is the same as date2, the result is zero. If date2 is earlier than date1, the result is a negative number. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if the Q&A table asks for a ClosingDate, then **{Days: {Now}, {Field: ClosingDate}}** gives the number of days between the closing date and the date on which the form is used. (This will be a negative number if the closing date precedes the date when the form is used.)

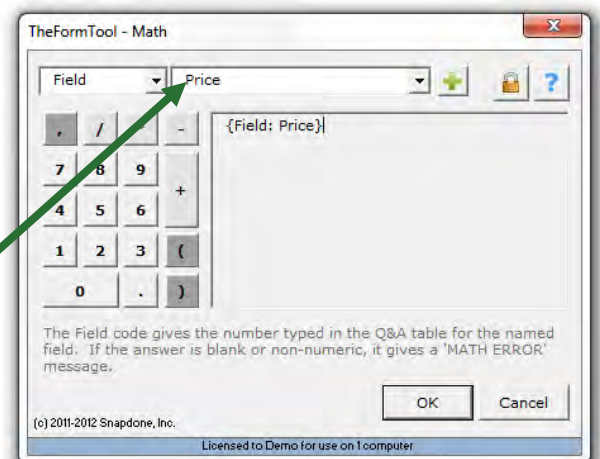
**In the Formula**  
**{Days: *date1*,  
*date2*}**

**Plain English**  
The number of days between two dates

## Field

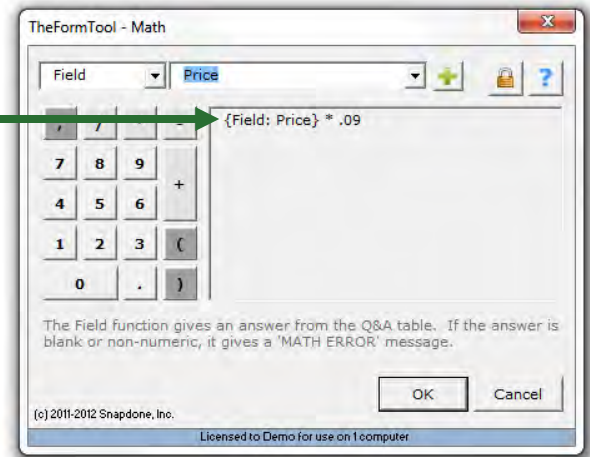
The **Field** function gives an answer from the Q&A table. If the answer is blank or non-numeric (for example, if someone types “five dollars” as the answer to your Price question), a “MATH ERROR” message appears.

After selecting **Field** in the first box, select a particular field in the second box.



For example, if the Q&A table includes a question labeled **Price**, then sales tax could be computed with this formula (assuming the sales tax is 9%).

Fields that occur within lists include item designations (current, previous, next, first, last). See Example 2 on page 77 for details.



**In the Formula**  
**{Field: label}**

**Plain English**  
The answer to a question in the Q&A table

### FirstDate

The **FirstDate** function gives the earliest of a series of dates, ignoring items that are not dates. For example, **{FirstDate: 5/5/2011, 3/15/2011, 2/20/2012}** = 3/15/2011. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if today's date is 3/12/2012 and the CommencementDate in the Q&A table is 4/1/2012, then **{FirstDate: {Now}, {Field: CommencementDate}, 3/15/2012}** = 3/12/2012.

**In the Formula**  
**{FirstDate: date1, date2, ... dateX}**

**Plain English**  
The earliest of these dates

### Integer

The **Integer** function gives the integer portion of a number, truncating any decimal portion. For example, **{Integer: 3.84}** = 3. Other functions may be nested within this one. For example, if the Q&A table asks for an EggCount, the form can compute the number of 3-egg omelets with **{Integer: {Field: EggCount} / 3}**.

**In the Formula**  
**{Integer: number}**

**Plain English**  
Convert a number to an integer, ignoring any fractional portion

## LastDate

The **LastDate** function gives the latest of a series of dates, ignoring items that are not dates. For example, {**LastDate**: 5/5/2011, 2/20/2012, 3/15/2011} = 2/20/2012. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if today's date is 3/12/2012 and the CommencementDate in the Q&A table is 4/1/2012, then {**LastDate**: {**Now**}, {**Field**: **CommencementDate**}, 3/15/2012} = 4/1/2012.

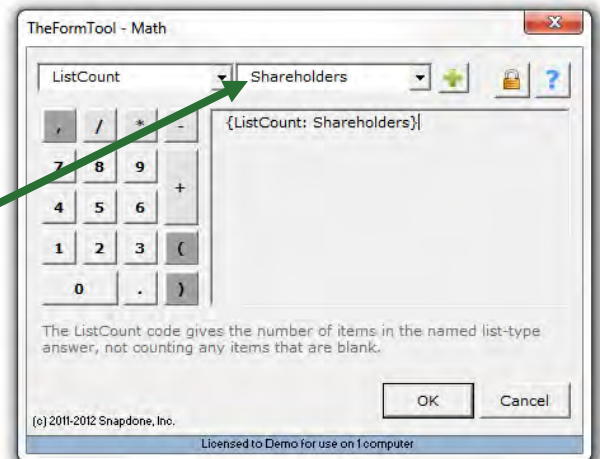
**In the Formula**  
{**LastDate**: *date1*,  
*date2*, ... *dateX*}

**Plain English**  
The latest of these dates

## ListCount

The **ListCount** function is only available if the Q&A table contains a list-type answer. It gives the number of items in a list-type answer, not counting any items that are blank. If all items are blank, the result is zero.

When one of the List functions is selected (**ListCount**, **ListFirstDate**, **ListItem#**, **ListLastDate**, **ListMax**, **ListMin**, **ListMultiply**, **ListSum**), choose a particular list in the second box.



**In the Formula**  
{**ListCount**: *label*}

**Plain English**  
Count the number of items in  
a list-type answer

## ListFirstDate

The **ListFirstDate** function is only available if the Q&A table contains a list-type answer. It gives the earliest date in a list-type answer, ignoring items that are not dates. If none of the items in the list is a date, an "ERROR - DATE FORMAT" message appears.

**In the Formula**  
{**ListFirstDate**:  
*label*}

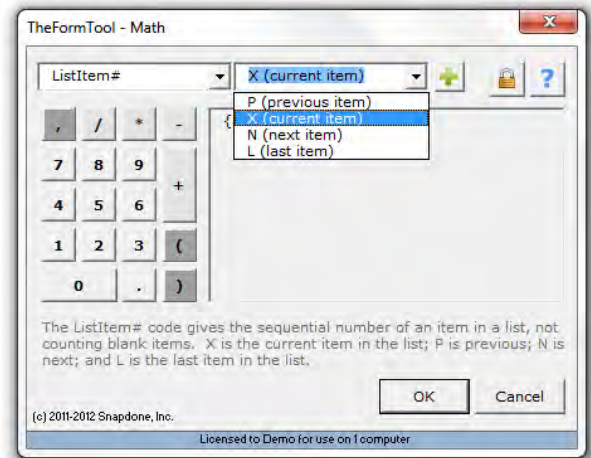
**Plain English**  
The earliest date in a list-type  
answer

## ListItem#

The **ListItem#** function is only available when creating or editing a field in a list. It gives the sequential position of a list item, not counting blank items.

Use **X** for the position of the current item; **P** for the previous item; **N** for the next item; and **L** for the last item in the list.

For example, if a list in the Q&A table contains 5 non-blank items, {**ListItem#**: L} = 5.



**In the Formula**  
{**ListItem#**: *item*}

**Plain English**  
The position of an item in a list-type answer

## ListLastDate

The **ListLastDate** function is only available if the Q&A table contains a list-type answer. It gives the latest date in a list-type answer, ignoring items that are not dates. If none of the items in the list is a date, an "ERROR - DATE FORMAT" message appears.

**In the Formula**  
{**ListLastDate**:  
*label*}

**Plain English**  
The latest date in a list-type answer

## ListMax

The **ListMax** function is only available if the Q&A table contains a list-type answer. It gives the largest number in a list-type answer, ignoring items that are blank or non-numeric. If none of the items in the list is a number, a "MATH ERROR" message appears.

**In the Formula**  
{**ListMax**: *label*}

**Plain English**  
The biggest number in a list-type answer

## ListMin

The **ListMin** function is only available if the Q&A table contains a list-type answer. It gives the smallest number in a list-type answer, ignoring items that are blank or non-numeric. If none of the items in the list is a number, a "MATH ERROR" message appears.

**In the Formula**  
{**ListMin**: *label*}

**Plain English**  
The smallest number in a list-type answer

## ListMultiply

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The **ListMultiply** function is only available if the Q&A table contains a list-type answer. It gives the product of all numbers in a list multiplied together, ignoring items that are blank or non-numeric. If none of the items in the list is a number, a “MATH ERROR” message appears.

### In the Formula

{ListMultiply:  
*label*}

### Plain English

Multiply all the numbers in a list-type answer together

## ListSum

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The **ListSum** function is only available if the Q&A table contains a list-type answer. It gives the sum of all numbers in a list added together, ignoring items that are blank or non-numeric. If none of the items in the list is a number, a “MATH ERROR” message appears.

### In the Formula

{ListSum: *label*}

### Plain English

Add all the numbers in a list-type answer together

## Logarithm

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The **Logarithm** function gives the base *n* logarithm of a number. For example, {Logarithm: 10, 100} gives the base 10 logarithm of 100. Other functions may be nested within this one. To calculate natural logarithms, use the {Constant: e} function as the base number. For example, the natural logarithm of 100 is {Logarithm: {Constant: e}, 100}.

### In the Formula

{Logarithm: *n*,  
*number*}

### Plain English (sort of)

The base *n* logarithm of a number

## Maximum

---

The **Maximum** function gives the largest of a series of numbers. For example, {Maximum: 5, 10, 3} = 10. Other functions may be nested within this one. For example, if the Q&A table asks for Income and two possible tax rates – TaxRateA and TaxRateB – then the largest possible amount of tax owed is {Maximum: {Field: TaxRateA} \* {Field: Income}, {Field: TaxRateB} \* {Field: Income}}.

### In the Formula

{Maximum: *number1*,  
*number2*, ... *numberX*}

### Plain English

The biggest of these numbers

## Minimum

---

The **Minimum** function gives the smallest of a series of numbers. For example, {Minimum: 5, 3, 10} = 3. Other functions may be nested within this one. For example, if the shipping and handling fee is 3% of the purchase price, but not to exceed \$7.50, use {Minimum: {Field: Price} \* .03, 7.50}.

### In the Formula

{Minimum: *number1*,  
*number2*, ... *numberX*}

### Plain English

The smallest of these numbers

## Months

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The **Months** function gives the number of months between two dates. *This function counts transitions from month to month; not the number of elapsed days divided by 30.* For example, **{Months: 1/31/2011, 3/3/2011}** = 2. If both dates occur in the same month, the result is zero. If date2 is in an earlier month than date1, the result is a negative number. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if the Q&A table asks for a ClosingDate, then **{Months: {Now}, {Field: ClosingDate}}** gives the number of months between the closing date and the date on which the form is used. (This will be a negative number if the closing date precedes the date when the form is used.)

**In the Formula**  
**{Months: date1,**  
**date2}**

**Plain English**  
The number of months  
between two dates

## Now

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The **Now** function gives the date when the form is filled in. It may be used by itself or inside a date function: **Days**, **Months**, **Years**, **FirstDate**, **LastDate**.

**In the Formula**  
**{Now}**

**Plain English**  
The date when the form is  
filled in

## Payment (PMT)

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The **Payment** function gives the periodic payment on a self-amortizing loan, assuming 360-day years, interest compounded periodically, payment in arrears. For example, **{Payment: 1000, 5 / 12, 120}** gives the monthly payment on a \$1,000 loan with a 5% annual rate of interest and a 120-month term. Other functions may be nested within this one. For example, if the Q&A table already asks for LoanAmount, AnnualRate, and MonthsInTerm, then the monthly payment could be computed as **{Payment: {Field: LoanAmount}, {Field: AnnualRate} / 12, {Field: MonthsInTerm}}**.

**In the Formula**  
**{Payment: amount,**  
**rate, term}**

**Plain English**  
Calculates the periodic  
payment amount when given  
the loan amount, interest rate  
per period, and number of  
periods in the loan term

## RaiseToPower

---

The **RaiseToPower** function performs exponentiation, multiplying a number by itself a number of times. For example, **{RaiseToPower: 8, 3}** = 512, because  $8 \times 8 \times 8 = 512$ . Other functions may be nested within this one. For example, if the Q&A table asks for the Length of a square plot of land, the acreage equals the Length squared: **{RaiseToPower: {Field: Length}, 2}**.

**In the Formula**  
**{RaiseToPower:**  
**number, exponent}**

**Plain English**  
Multiply a number by itself a  
number of times



## Remainder (modulo)

---

The **Remainder** function gives the remainder value after division. For example, **{Remainder: 10, 3}** = 1, because 10 divided by 3 leaves a remainder of 1. Other functions may be nested within this one. For example, if the Q&A table asks for a list of People to be split into 4 equal groups, the number of leftover people is **{Remainder: {ListCount: People}, 4}**.

**In the Formula**  
**{Remainder:**  
*dividend, divisor*

**Plain English**  
The remainder that's left over after dividing a number by another number

## Root

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The **Root** function gives the *n*th root of a number (square root is 2nd root; cube root is 3rd root, etc.). For example, the square root of 9 is **{Root: 2, 9}**; and the cube root of 125 is **{Root: 3, 125}**. Other functions may be nested within this one. For example, according to the Pythagorean Theorem, if the Q&A table asks for the lengths of Leg1 and Leg2 of a right triangle, then the length of the hypotenuse is **{Root: 2, {RaiseToPower: {Field: Leg1}, 2} + {RaiseToPower: {Field: Leg2}, 2}}**.

**In the Formula**  
**{Root: *n*, number}**

**Plain English (sort of)**  
The *n*th root of a number

## Round

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The **Round** function rounds a number to the nearest integer. Halves are rounded down. For example, **{Round: 5.5}** = 5; and **{Round: 5.51}** = 6. Other functions may be nested within this one. For example, if the Q&A table asks for a list of SharesHeld by each shareholder, then the average number of shares held by each shareholder is approximately **{Round: {ListSum: SharesHeld} / {ListCount: SharesHeld}}**.

**In the Formula**  
**{Round: *number*}**

**Plain English**  
Round off a number

## Years

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The **Years** function gives the number of years between two dates. *This function counts transitions from year to year; not the number of elapsed days divided by 365.* For example, **{Years: 12/31/2010, 1/1/2012}** = 2. If date1 is in the same year as date2, the result is zero. If date2 is in an earlier year than date1, the result is a negative number. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one.


**In the Formula**  
**{Years: *date1*,  
date2}**

**Plain English**  
The number of years between two dates

## Attention Markers

Occasionally you will want to draw the form user's attention to a particular portion of the form – perhaps a lengthy section needs to be drafted from scratch.

Select the location in the document, click  **Attn Mark**, and type a message if desired.

When the form is used, the cursor jumps to the marked location and your message (if any) is presented. If you have marked several spots for attention, the form user clicks  **Attn** to visit each of them.



## Using Smarter Forms



### Answering Questions in the Q&A Table



#### Tabbing Is the Best!

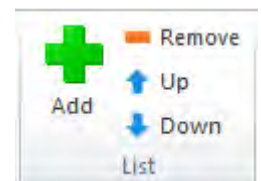
When answering questions in the Q&A table, press **Tab** to move from one answer to the next (**Shift+Tab** to move backwards). It's quicker than reaching for the mouse (quicker even than reaching for the arrow keys on your keyboard). And it has an additional enormous advantage when the Q&A table contains Smart Answers: it moves your cursor exactly where needed to respond to the next question, skipping over any extraneous text and preselecting the entire answer for easy type-over replacement. Just tab 'n go!

#### Working With List Answers


Several buttons on The**FormTool** ribbon make it easy to work with List answers.

If the answer doesn't contain enough empty boxes to type in, click  **Add** to create more. Or click  **Remove** to remove an item from the List. (When working in a List answer, a flag appears above the cursor, reminding you to "click Add to add an item".)

Click  **Up** or  **Down** to rearrange items in the List.






#### Working With Choice Answers

Some Choice answers draw their choices from external sources, like Master Lists. To update them with current choices, click  **Refresh**. (When working in one of these Choice answers, a flag appears above the cursor, reminding you to "click Refresh to update choices".)




## Peeking


While typing answers in the Q&A table, you may want to peek at the location(s) in the form where your answer will be used. Click  **Peek Next** to turn on a split-screen view showing where the current answer is used in the form. Click  **Peek Next** again to advance to the next spot where the same answer is used, or click  **Peek Off** when you're finished with the split-screen view.


## Filling in the Form

### Start



After opening a form, click  **Start** to quickly move the cursor to the top of the Q&A table, ready to start answering questions.

### Fill



After typing answers in the Q&A table, click  **Fill** to move all of the answers up into the form, automatically formatting fields properly, changing pronouns and singular/plural words, calculating date offsets and math, and including or excluding conditional text as appropriate.



After filling in the form, you may save it in its "filled" state indefinitely. At some later date, if a misspelling is discovered or other information changes, simply make the revision in the Q&A table then click  **Fill** again to update the entire form.

### Attention Markers

If a form contains an Attention Marker, it will automatically be selected when you click  **Fill**, and its message (if any) displayed. To move on to other Attention Markers in the same form, click  **Attn.**

### Reset


After filling in a form with the  **Fill** button, you may want to return to the original unfilled view. Click  **Reset** to return the form to its original state, without disturbing the contents of the Q&A table.

This is especially important for form creators when testing a form. After clicking  **Fill** to test a form, always  **Reset** before making changes to the form; otherwise your changes might be lost.

### Blanks

Click  **Blanks** to replace fields with blank lines. This is handy if you want to print out a copy of the form so that it can be filled in by hand.


### Petrify

After finalizing a document, you may click  **Petrify** to convert all fields to plain text and remove the Q&A table. The document is then ready for emailing to a client or filing with the court.


## Capturing and Reusing Data (Save/Load)

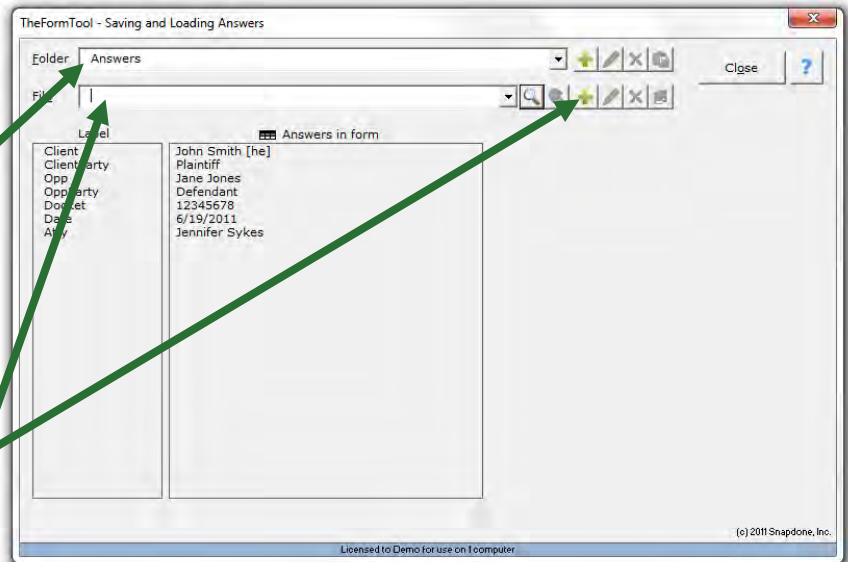
Many forms might be used in a single matter, and lots of information is repeated among those forms – the client's name, address, phone number, the spouse's name, the docket number, and so on. Rather than retype all that information in each form, you can save answers from one form and reuse those answers in later forms.


## Saving Answers

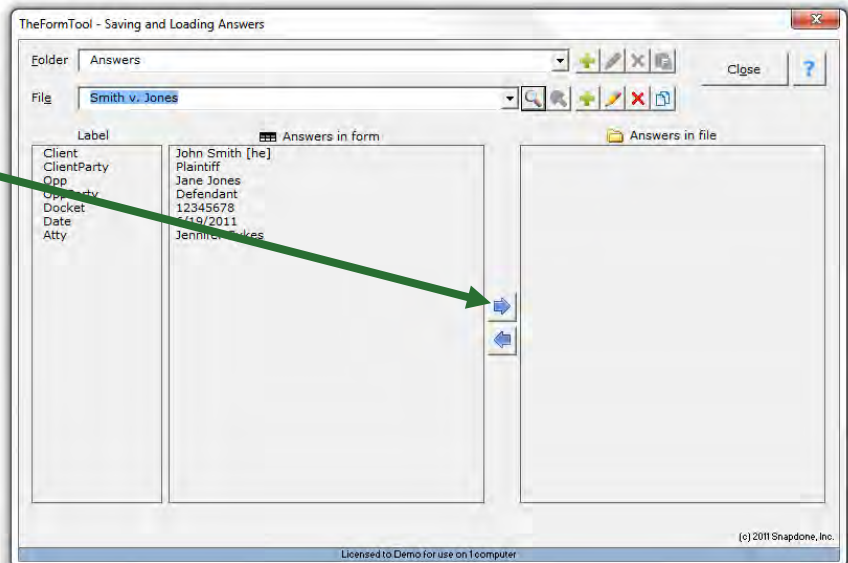
After typing answers in a Q&A table, click  **Save/Load** to open this screen.

Choose where the file will be saved in the **Folder** box. (See “Organizing Answer Files” on page 38 for more on creating, renaming, and deleting folders.)

If a file has already been created for this matter, select it in the **File** box. If not, Click  plus to create a new file.

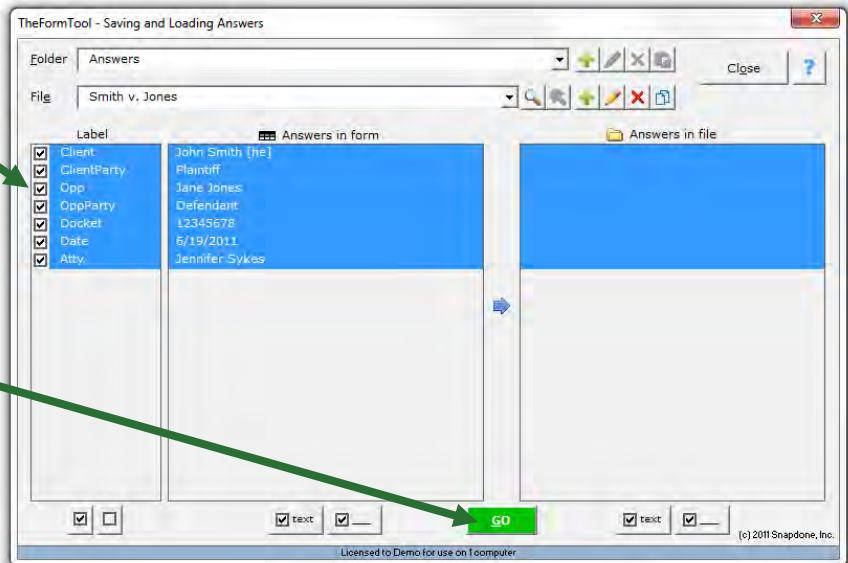


After selecting (or creating) a file for this matter, click the  right arrow to indicate answers should be copied from the form to the file.




Checkboxes show which answers will be copied to the file and give you a chance to refine the selection if needed.

Click **GO** to finish.




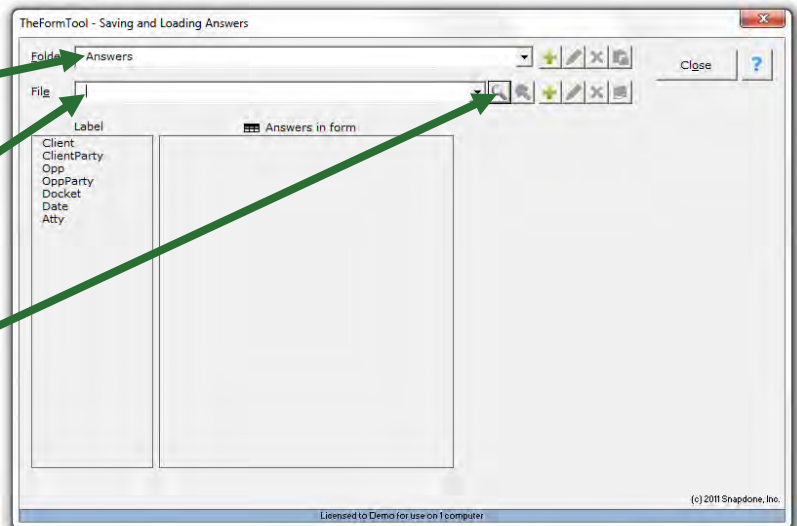
## Loading Answers


Now suppose that you are working on a second form for the same matter. Instead of retyping answers into the second form's Q&A table, simply load the answers you saved previously.

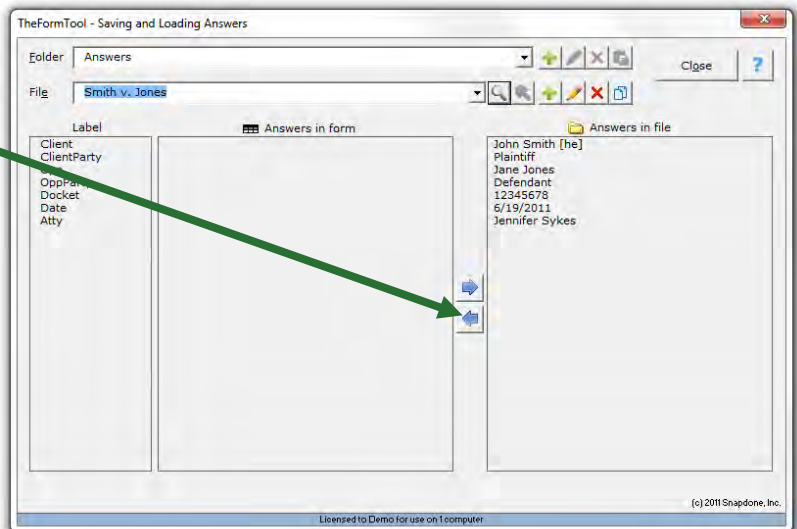
Click  **Save/Load** and select the **Folder** where the matter file is saved.

Select a matter file in the **File** box.

If there are lots of matter files, use the  **Search** button for fast results.

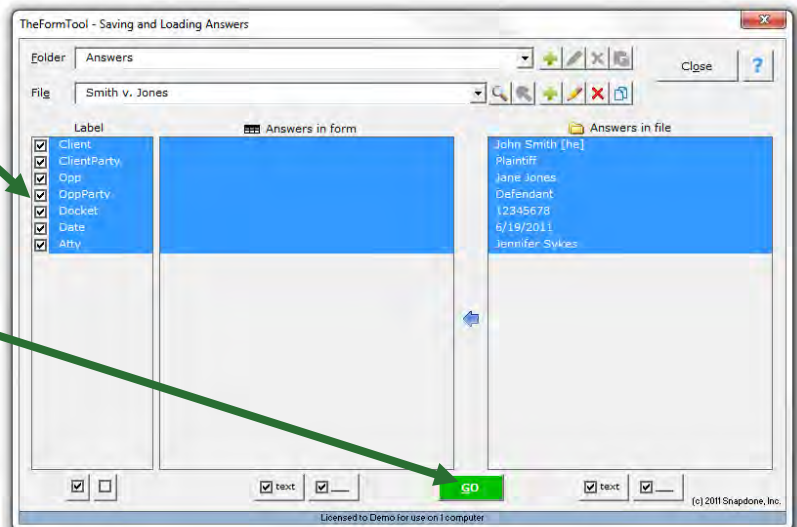


After selecting a matter file, click the  left arrow to indicate answers should be copied *from the file to the form*.





Checkboxes show which answers will be copied to the form.

Click **GO** to finish.



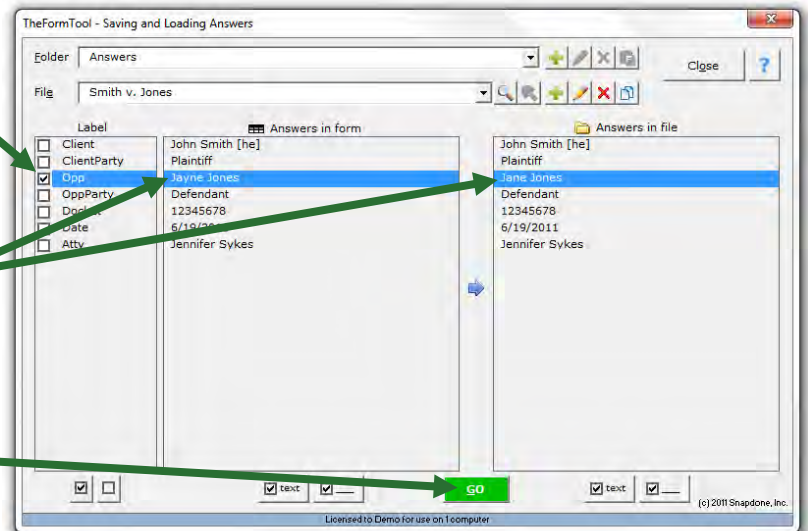
## Updating Answers

You will frequently want to update the answers in a matter's answer file. Perhaps you corrected a name spelling, or maybe a new form asked questions that did not appear in earlier forms. With the current form on your screen (and accurate answers in the form's Q&A table), click  **Save/Load**, select the matter file, and click the  right arrow to indicate answers should be copied *from the form to the file*.

Answers that differ between the form and the saved file are automatically selected.


In this example, the opposing party's name was spelled **Jane Jones** in the saved file, but it has been corrected to **Jayne Jones** in the form.

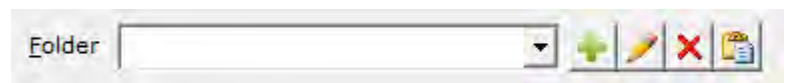
Click **GO** to finish, and the file is updated with the new name spelling.








## Organizing Answer Files

When first installed, TheFormTool stores all matter files in a single folder named "Answers". But you may want to subdivide that folder into several subfolders (Criminal, Corporate, Estate Planning, etc.) or even sub-subfolders.






Use the **Folder** buttons at the top of the  **Save/Load** screen to organize the matter files where answers are saved in your office.





Click  plus to create a subfolder within the selected folder, the  pencil to rename a subfolder, or  to remove a subfolder. The  paste button is used to paste a matter file into the selected folder after copying it from another folder.

Use the **File** buttons at the top of the  **Save/Load** screen to manage matter files.






Click  search to find a file in the currently selected folder or its subfolders, and  cancel search to return to a listing of all files. Click  plus to create a new matter file within the selected folder, the  pencil to rename a file, or  to permanently remove a matter file and all the answers it contains.


To use one matter file as a starting point for another (for instance, if two matters are related and share much of the same information), click  copy to copy the first file, select the folder where the new file belongs, then click  paste.

# More Tools for the Form Creator

## The Field/List/Condition Screen

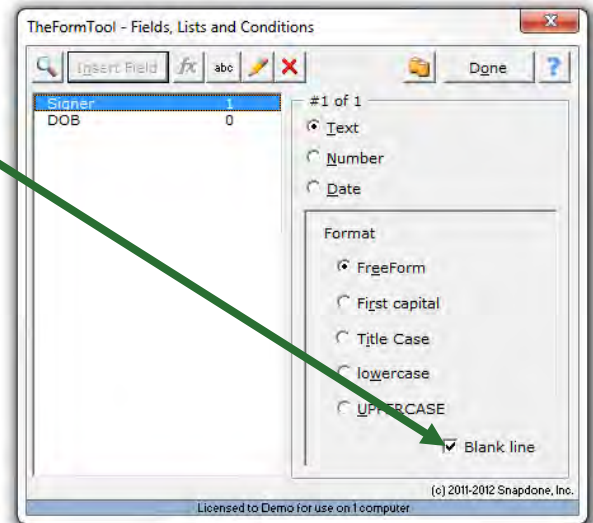
The Field/List/Condition screen (click  **Field**,  **List**, or  **Condition** to open it) contains a few more features to make life easier for form creators.

### Blank Lines

When inserting many types of fields, a **Blank line** checkbox appears in the Format screen to determine how fields are handled during the  **Fill** step when answers are left empty in the Q&A table.

If **Blank line** is *checked* for a particular field and its answer is left empty, the field appears as a blank line in the finished document.

If **Blank line** is *unchecked* for a particular field and its answer is left empty, the field is removed from the finished document with no placeholder left behind.

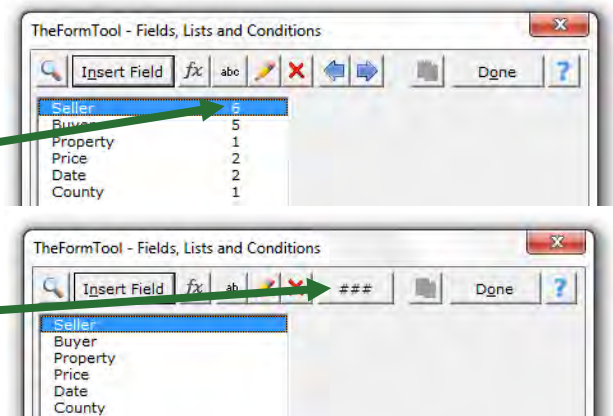


Including blank lines is usually preferable, because they provide a visual cue when information is missing. But you may want to exclude blank lines for fields in table cells, for instance, because the blank line looks confusing (and unattractive) next to the table grid lines.

### Field/List/Condition Count


Notice the column of numbers. They indicate how many times each answer in the Q&A table is used in the form, whether as a Field, a List, or a Condition. In this example, the answer to the Seller question in the Q&A table is used 6 times in the form.

If the form contains a huge number of fields, TheFormTool saves a little time by not counting them each time this screen opens. In that event, click **###** if you'd like to see the numbers.

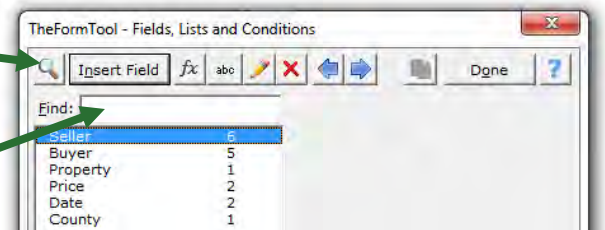




## Search for a Label

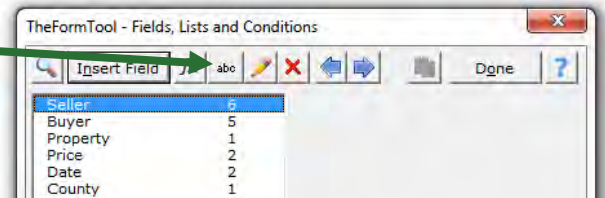
When the list is long, it can be tough to find a particular label. Click the  magnifying glass to display the **Find** box.

Type any part of the label name in the box to locate the one you want.




## Alphabetize

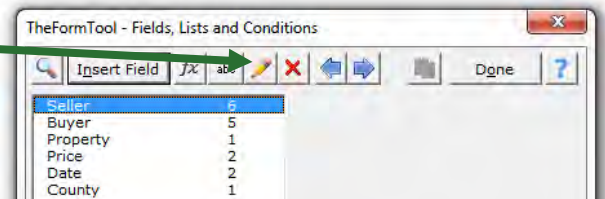
Click **abc** to toggle alphabetical sorting on and off. With alphabetical sorting turned off, labels are listed in the same order that they appear in the Q&A table.




## Relabeling a Question and Renaming Fields



Click the  pencil to change a question's label. This also renames any fields in the form that are associated with that question.

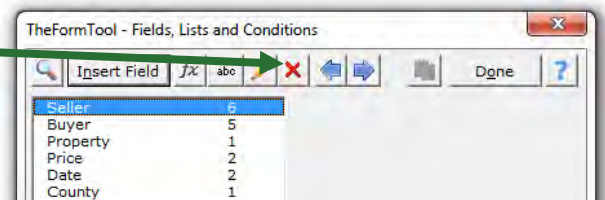
(You can also relabel a question by selecting a label in the Q&A table and clicking  **Field**.)





## Removing a Question and Fields

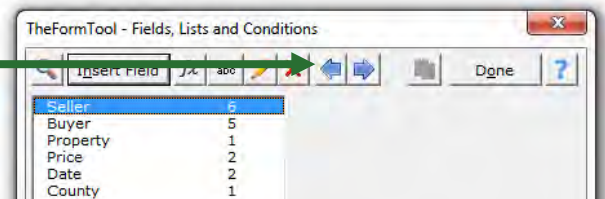
Click  to remove a question from the Q&A table and its corresponding fields from the form.

(You can also remove a question by selecting a row in the Q&A table and clicking  **Row**,  **Remove**.)






## Move to Field/List/Condition in Form

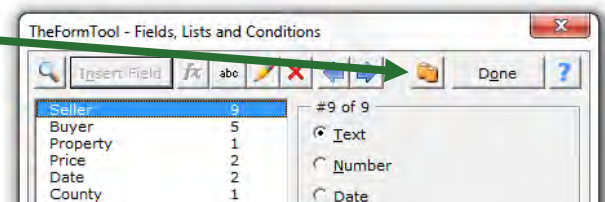
Click the   arrows to move the cursor to the previous or next place in the form where the selected answer is used. This is handy when you want to review all places in the form that are affected by a particular answer (similar to Peeking, described on page 35).



## Find Other Locations to Paste Field

After inserting a field, you may click the  find-and-paste button to find other locations in the form where you want to paste the same field.









You can also use the Find and Paste feature directly from the **TheFormTool** menu by clicking  **Tools**,  **Find and Paste** (page 45).




## Editing Q&A Tables




The Q&A table is “locked down” to prevent form users from accidentally changing the structure that was built by the form creator. So you cannot use Word’s ordinary table editing commands to delete a row, for example. But **TheFormTool** provides several complementary commands so it’s still easy to work with the Q&A table.

### Rows


Click  **Row** for a list of commands to manipulate rows in the Q&A table. Add and remove rows with  **Add** and  **Remove**. Copy a row with  **Copy**. Rearrange rows with  **Move Up** and  **Move Down**. Toggle the visibility of Derived Answers with  **Show/Hide** (see page 11). Organize long Q&A tables with  **Divider** (see page 41).

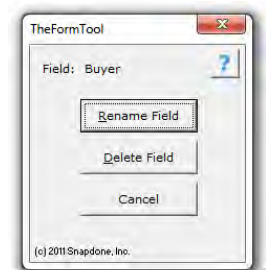
### Empty Cells

When you need a clean slate, select any number of cells in the Q&A table and click  **Tools**,  **Empty Cells** to delete their contents.



TOOL TIP: To delete a whole Q&A table and start over, either click  **Petrify** (this also removes all the fields in the document) or select the whole table, click  **Tools**,  **Empty Cells**, and then delete the table.

## Relabeling and Deleting Questions

To relabel or delete a question in the Q&A table, select its label and click  **Field**. Relabeling or deleting a question also relabels or deletes all of its associated fields in the form.






### Clearing Answers

While creating a form, you may type sample data into the Q&A table for testing purposes. When the form is finished, you can empty out all of the sample data by clicking  **Tools**,  **Clear Answers**.




### Dividers

Large Q&A tables can be organized with dividers. For example, we’ll divide this table into “Buyer Info” and “Seller Info”.



Place the cursor anywhere in the BuyerName row and click  **Row**,  **Divider**,  **Add** to insert a divider above that row.




TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
SellerName	Name of buyer?	
SellerAddr	Address of buyer?	
SellerName	Phone number of buyer?	

Notice that **[type heading here]** is selected, ready for you to type a heading for this part of the Q&A table. Type **Buyer Info**.

Move the cursor down to the SellerName row and insert another divider: click  **Row**,  **Divider**,  **Add**. Type **Seller Info** as a heading for the second divider.

When finished, the Q&A table looks like this.

If you change your mind, place the cursor in any divider row and click  **Row**,  **Divider**,  **Remove** to delete it.

If corporate gray is not your thing, you can individually colorize any section by placing the cursor in it, clicking  **Row**,  **Divider**,  **Color**, and choosing a shade.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
[type heading here]		
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
SellerName	Name of buyer?	
SellerAddr	Address of buyer?	
SellerName	Phone number of buyer?	

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Buyer Info		
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
Seller Info		
SellerName	Name of buyer?	
SellerAddr	Address of buyer?	
SellerName	Phone number of buyer?	

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Buyer Info		
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
Seller Info		
SellerName	Name of buyer?	
SellerAddr	Address of buyer?	
SellerName	Phone number of buyer?	

## Reusing Q&A Tables

As you create more forms, you will find yourself asking the same types of questions in many different Q&A tables. You might have one set of questions that are typically used in Estate Planning matters, another set for Litigation matters, and another for Corporate matters. Rather than recreate those Q&A tables from scratch in each form (or finding an old form to copy-and-paste the Q&A table), save your most often-used Q&A tables in a “bank” for future use.

## Saving a Q&A Table

Note that this process is different than saving *answers* (see page 35). Here we're saving the *questions* in a Q&A table so that they can be used to quickly create similar Q&A tables in other forms.

Open a form that contains a good Q&A table and click

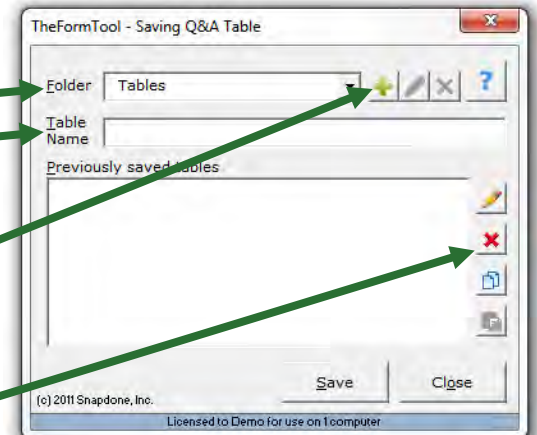
 **Table** to open this screen.

Choose a **Folder** in which to save the table.


Type a **Table Name**, and click **Save**.

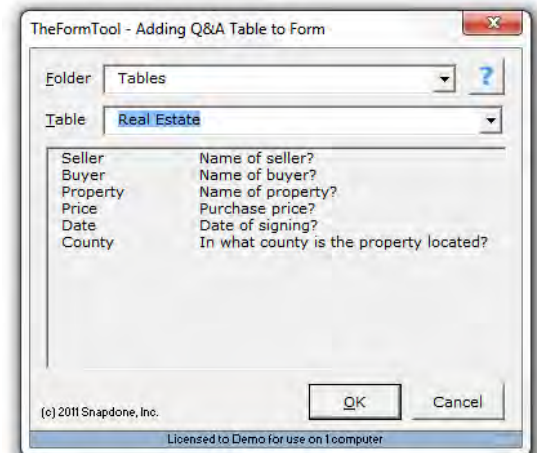
Other buttons in this screen work the same as those in the answer-saving screen (see "Organizing Answer Files" on page 38). Use the three buttons at the top to create, rename, and delete subfolders.

And use the four buttons on the right to rename, delete, copy, and paste previously saved tables.





## Reusing a Saved Q&A Table

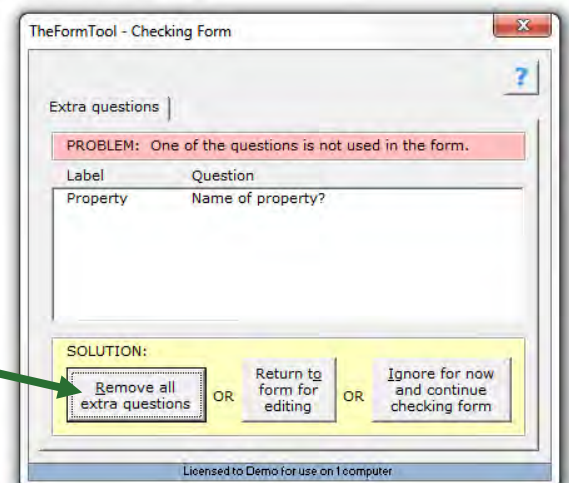
Once you've saved a Q&A table, it will be presented as a choice every time you add a Q&A table in a new form. Just click  **Table** as usual, and make your selection from this screen.



## Checking Forms

After creating a form, it's a good idea to click  **Tools**,  **Check Form**. The **FormTool** checks for problems or inconsistencies and helps fix them.



In this example, the Q&A table contains a question asking for the name of the property, but the form doesn't contain any fields that use that question. Clicking **Remove all extra questions** would remove that question from the Q&A table, since it is not used in the form.



## Master Lists

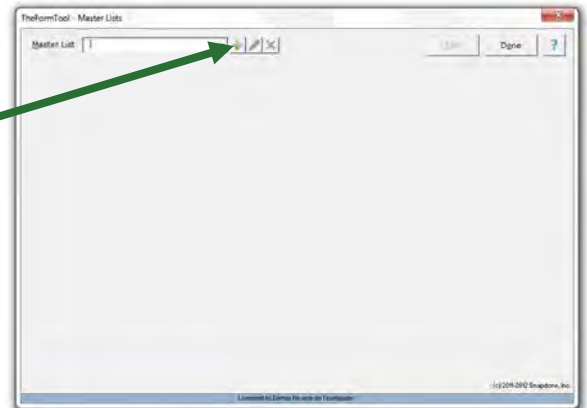
Master Lists are great repositories for information that is used in multiple forms. For example, at law firms many forms contain a signature block for a signing attorney, perhaps including the attorney's email address and bar number. Rather than require the form user to type that information, create a Choice answer that uses a Master List as its source (described on page 9). Not only have you saved the form user the trouble of typing the attorney's name; they also don't have to type (or even remember) the attorney's email address and bar number. And when a new attorney joins the firm, type the new name, email, and bar number into a single location – the Master List – and all of the forms using that Master List are updated with the new information.

In this example, we'll create a Master List named "Attorneys" to store attorney names, bar numbers, and email addresses.

Click  **Master List** to open this screen, and click  plus to create a new list.

When asked for the new list's name, type **Attorneys** and click **OK**.

When asked how many columns, type **3** and click **OK**.



A Word document is created. This is the Master List editing document – it's the workspace where you will create the list of attorneys.

Begin by typing a heading for each column: **Name**, **Bar#**, and **Email**.

Then fill in as many rows as you like. To create a new row, press **Tab** when the cursor is in the last cell.

**MASTER LIST: Attorneys**  
After editing, click the **Master Lists** button on TheFormTool tab to save changes.

[type heading here]		

**MASTER LIST: Attorneys**  
After editing, click the **Master Lists** button on TheFormTool tab to save changes.


Name	Bar#	Email

**MASTER LIST: Attorneys**  
After editing, click the **Master Lists** button on TheFormTool tab to save changes.


Name	Bar#	Email
Jennifer Sykes	298934	sykes@lawfirm.com
Herb Blount	239478	blount@lawfirm.com
Ethel Adams	128234	adams@lawfirm.com





**IMPORTANT:** Save your work!

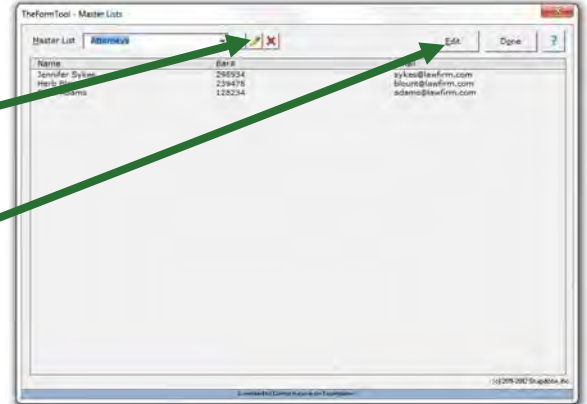
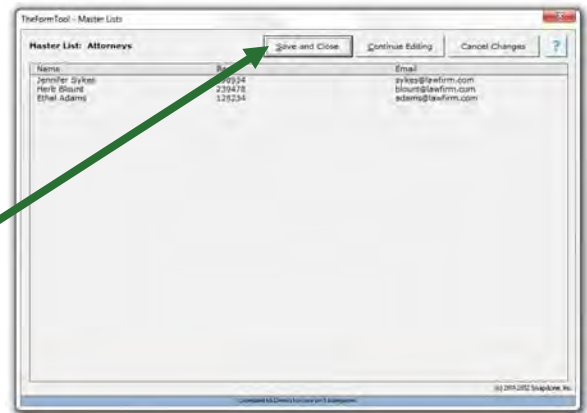
When you're finished editing, click  **Master List** to return to this screen. The list you created is summarized here.

Click **Save and Close** to save your work (or **Continue Editing** to return to the Master List editing document).

Click  **Master List** at any time to return to the Master List screen and manage your lists.



After selecting a Master List, click the  pencil to rename, or  to permanently remove the whole list and all the data it contains.

Click **Edit** to open the selected list as a Master List editing document so you can make changes or additions.



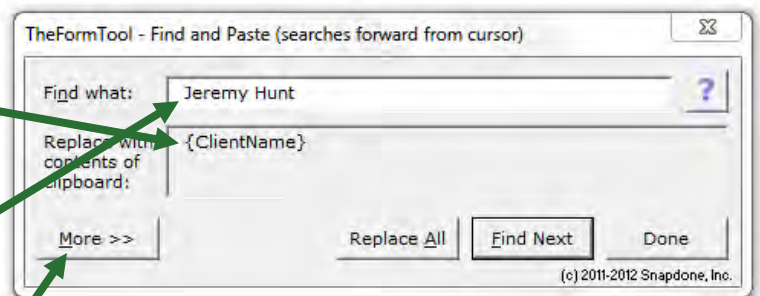
**TOOL TIP:** The Master List editing document uses an ordinary Word table, so you can use all of Word's built-in table editing commands to add, delete, and move both rows and columns. A summary of handy keystrokes is included in the footer of the Master List editing document. You can also copy and paste data from an Excel spreadsheet (or other similar source).

## Find and Paste

The Find and Paste screen (click  **Tools**,  **Find and Paste**) allows you to search for any text and replace it with whatever you most recently copied to the Windows clipboard. It's most commonly used when creating forms from old documents – search for the old client's name everywhere it appears in the document, and replace it with a corresponding field that you've copied.

In the example shown here, a {ClientName} field was recently copied to the Windows clipboard (with **Ctrl+C** or any other copying method).

The Find and Paste command is being used to paste that copied field everywhere the name Jeremy Hunt appears in the document.



Click **More** to see the same search options that appear in Word's search-and-replace screen: wildcards, sounds-like, special characters, etc.

A shortcut to the Find and Paste screen also appears in the Field screen when inserting fields (page 40).





## Options

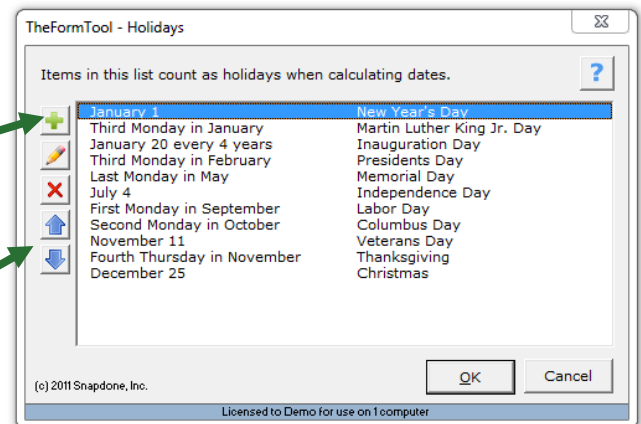
### Holidays

When creating Date Offsets (described on page 13), you can choose to skip holidays. TheFormTool initially includes the 11 official U.S. federal holidays, but you can add other holidays too.

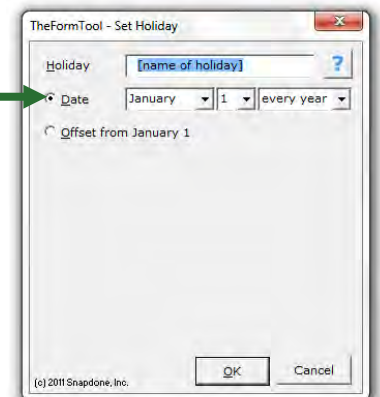
Click  **Options, Holidays** to open this screen.

Clicking  plus to create a new holiday or the  pencil to modify an existing holiday opens the holiday editing screen, shown below.

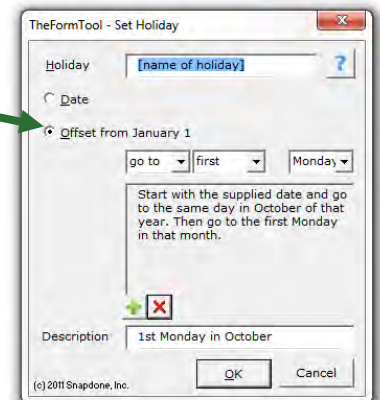
Click  to remove a holiday or the   arrows to reorder the list.



Select **Date** for holidays that occur on a specific date, either each year or in a particular year.




Select **Offset from January 1** for holidays that require a formula, like the first Monday in October.





See Example 5 on page 62 for tips on creating Date Offsets.

### Activating TheFormTool PRO


To activate TheFormTool PRO first purchase a license at [www.purchase.theformtool.com](http://www.purchase.theformtool.com). After receiving your license code, click  **Options, License code** to enter your firm's registered name and license code.

## Sharing Information

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. If you previously saved information on your local computer, you will be asked whether you want to copy that information to the shared folder.

If several people in your office have separately saved information on their local computers and you now want to combine the various collections of files in one shared drive, you will likely want to exercise some discretion over which files are copied from each user to avoid duplications and overwriting. To do that, use Windows Explorer to browse to each user's local **TheFormTool** file location (indicated in their  **Options, Path** screen) and copy only the desired files from that user's local folder to the new shared folder.

## Uninstalling

To uninstall **TheFormTool**, click  **Options, Uninstall**. A message directs you to the file that needs to be deleted on your computer.

## Step-by-Step Examples in Excruciating Detail

Before embarking on these examples, read "Creating a Basic Form" on page 3 so you're comfortable with creating a Q&A table and adding fields to a form. In fact, take some time to work through a few simple forms first, to get your sea legs. Once you're comfortable with the basics, these advanced examples will feel less intimidating and more like a natural progression.

### Example 1: Pronouns and Plurals

This deceptively short sample document is chock full of opportunities to try out Pronoun answers, Pronoun fields, and Singular/Plural fields.

We'll spend lots of time on these two sentences. When we're done, the form will adapt to every possible combination of plaintiff(s) and defendant(s) – whomever and whatever – with automatic and flawless grammatical shifts.

If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.


Bob Lobb ("Plaintiff") hereby requests that the Court grant his motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

### Step 1. Create the Q&A Table

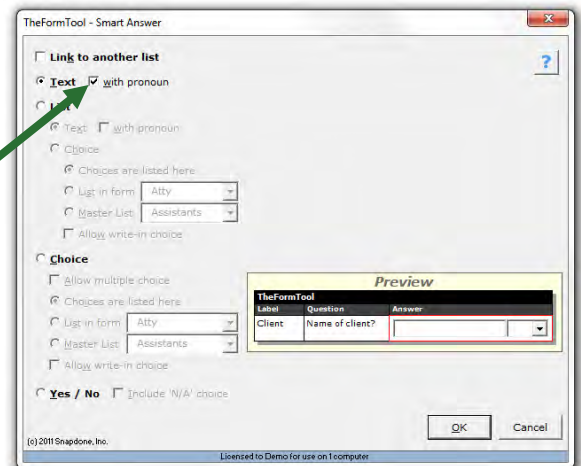
TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Client	Name of client?	
ClientParty	What party is the client?	
Opponent	Name of opponent?	
OppParty	What party is the opponent?	

## Step 2. Create Smart Answers


When asking for the client's name, we also need to ask for a pronoun.



Place the cursor in the answer box for the Client question, click  **Answer**, select **with pronoun**, and click **OK**.

Do the same for the question labeled Opponent that asks for the opponent's name.



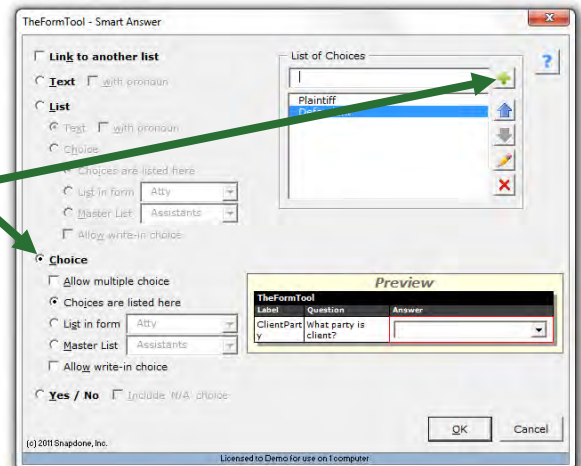
When asking for the client party, we'll offer two choices.

Place the cursor in the answer box for the ClientParty question, click  **Answer**, and select **Choice**.

The box in the upper right corner of the screen is where choices are added. Type "Plaintiff" and click  plus, then type "Defendant" and click  plus.


Your end result should look like the screen shown here. Click **OK**.

Do the same for the question labeled OppParty that asks for the opponent's party.



## Step 3. Add Basic Fields

Take another look at the document. We need to replace "Bob Lobb" with a field for the client's name.

Select **Bob Lobb**, click  **Field**, select **Client**, and click **Insert Field, Done**.

With our first field in place, the form looks like this.

Replace both occurrences of the word "Plaintiff" with a ClientParty field, the name "AAA Company" with an Opponent field, and both occurrences of the word "Defendant" with an OppParty field.

**Bob Lobb** ("Plaintiff") hereby requests that the Court grant his motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

{Client} ("Plaintiff") hereby requests that the Court grant his motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

With all of those basic fields in place, the form looks like this.

{Client} ("{ClientParty}") hereby requests that the Court grant his motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so it should be required to pay {ClientParty}'s attorney fees.

#### Step 4. Add Pronoun Fields

To reap even more benefits every time this form is used in the future, we want to make it smart enough to handle pronouns automatically, no matter whether our client is male, female, a married couple, or a business entity.

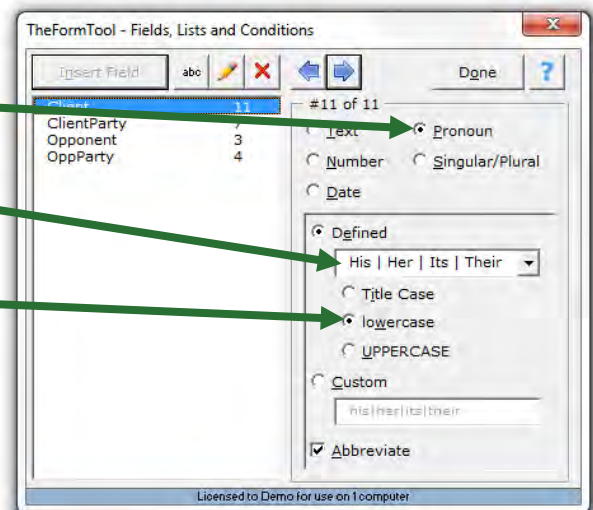
Select the word **his**, click  **Field**, select **Client**, and click **Insert Field**.

{Client} ("{ClientParty}") hereby requests that the Court grant his motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so it should be required to pay {ClientParty}'s attorney fees.

Select **Pronoun**.

Select **His|Her|Its|Their** from the dropdown box.

Select **lowercase** and click **Done**.



After placing the first pronoun field, the form looks like this. (Note the addition of the {his|her} pronoun field.)

{Client} ("{ClientParty}") hereby requests that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so it should be required to pay {ClientParty}'s attorney fees.

Select the word **it** and make it a Pronoun field too. This time, however, you'll select **Opponent** instead of **Client**, and select **He|She|It|They** instead of **His|Her|Its|Their**. Then **lowercase** and **Done**.

{Client} ("{ClientParty}") hereby requests that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so it should be required to pay {ClientParty}'s attorney fees.

With both pronoun fields in place, the form looks like this.

{Client} ("{{ClientParty}}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{{OppParty}}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}'s attorney fees.


## Step 5. Add Singular/Plural Fields

We want this form to give flawless results even when our client is a married couple. Note the differences in these two phrases:

Bertrand Loopin ("Plaintiff") hereby requests...

Bertrand and Agnes Loopin ("Plaintiffs") hereby request...

When there is one client, an "s" appears at the end of "requests". When there are two clients, an "s" appears at the end of "Plaintiffs". We'll use Singular/Plural fields to handle this grammatical requirement.

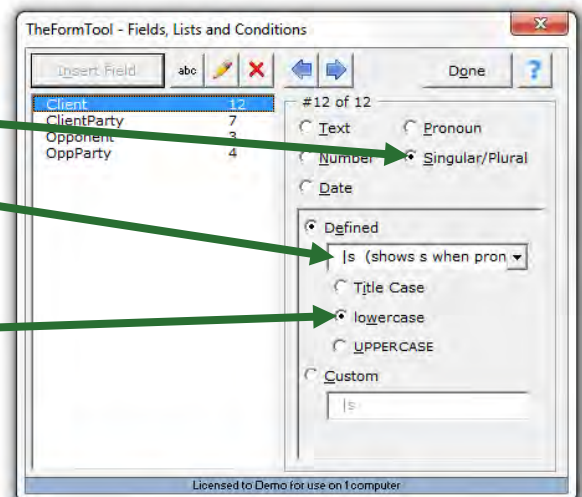
Place the cursor immediately after the first {ClientParty} field, click  **Field**, select **Client**, and click **Insert Field**.

{Client} ("{{ClientParty}}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{{OppParty}}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}'s attorney fees.

Select **Singular/Plural**.

Select **Is (shows s when pronoun is plural)** from the dropdown box.

Select **lowercase** and click **Done**.



After placing the first Singular/Plural field, the form looks like this. (Note the addition of the {s} field.)

{Client} ("{{ClientParty}}{s}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{{OppParty}}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}'s attorney fees.

The same idea applies every time the {ClientParty} field appears. Rather than creating another Singular/Plural field from scratch, copy that first {s} field and paste it near the end of the form as shown here.

{Client} ("{{ClientParty}}{s}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{{OppParty}}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}{s}'s attorney fees.



Now select the **s** at the end of **requests**. We're going to replace this character with another Singular/Pronoun field.

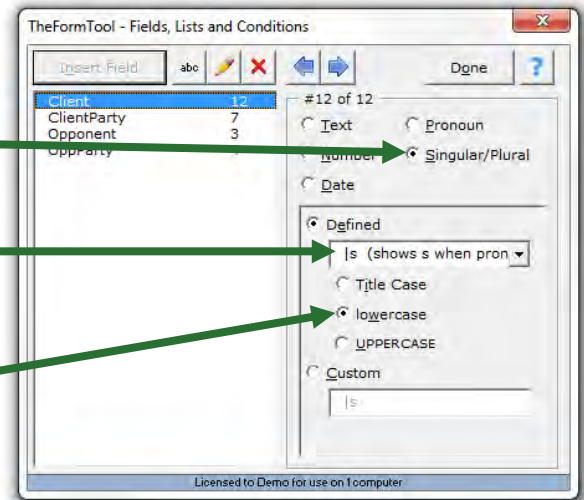
{Client} ("{{ClientParty}}{s}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{{OppParty}}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}{s}'s attorney fees.

Click **Field**, select **Client**, and click **Insert Field**.

Select **Singular/Plural**.

Select **Is (shows s when pronoun is singular)** in the dropdown box (Note that this is the opposite of our selection last time.)

Select **lowercase** and click **Done**.



After placing those three Singular/Plural fields, the form looks like this. (Note the **{s}** field at the end of "request".)

{Client} ("{{ClientParty}}{s}") hereby request{s} that the Court grant {his/her} motion and rule against {Opponent} ("{{OppParty}}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}{s}'s attorney fees.

### Readability

You may have noticed that the three **{s}** fields are visually indistinguishable, even though they are different – two of them add an "s" when the pronoun is *plural*, and the third adds an "s" when the pronoun is *singular*. TheFormTool abbreviates fields this way to keep the form readable, but you can always see the full details of any field (and modify them if you like) by selecting the field and clicking **Field**.

Using the same methods, add Singular/Plural fields after each of the two **{OppParty}** fields. In the **Field** screen you'll be selecting **Opponent** and **Is (shows s when pronoun is plural)**.


Select the word "has" and replace it with a Singular/Plural field. In the **Field** screen you'll be selecting **Opponent**, **has|have**, and **lowercase**.

After all that, you'll be relieved to hear the form is nearly complete.

{Client} ("{{ClientParty}}{s}") hereby request{s} that the Court grant {his/her} motion and rule against {Opponent} ("{{OppParty}}{s}"). The {OppParty}{s} {has|have} produced no evidence, so {he/she} should be required to pay {ClientParty}{s}'s attorney fees.



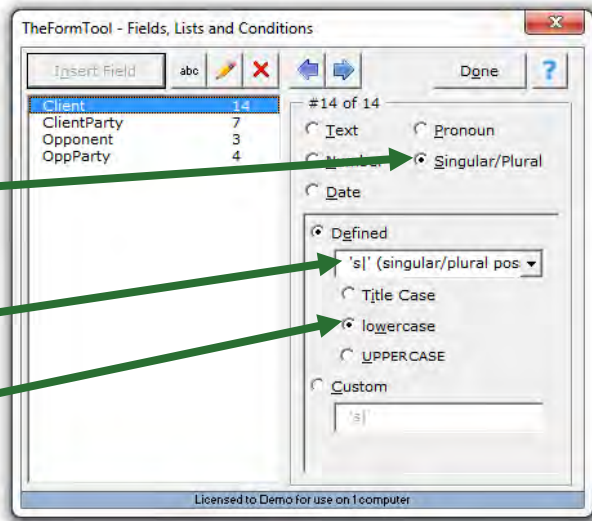
Notice the 's near the end of the form. When there is only one client, proper spelling requires an apostrophe and an s. But when there are two clients, only the apostrophe is required. We'll add one more Singular/Plural field to handle this quandary.

Select both the apostrophe and the s, click  **Field**, select **Client**, and click **Insert Field**.

Select **Singular/Plural**.

Select 's|' (**singular/plural possessive**) in the dropdown box.

Select **lowercase** and click **Done**.



And the form is complete. Be reassured that this is an unusually high concentration of fields. Most forms you create will not contain 15 fields in 2 sentences – this example was contrived to pack lots of stuff into a small space just to give you a good workout.

{Client} ("{ClientParty}{s}") hereby request{s} that the Court grant {his/her} motion and rule against {Opponent} ("{OppParty}{s}"). The {OppParty}{s} {has/have} produced no evidence, so {he/she} should be required to pay {ClientParty}{s}'s attorney fees.

## THE PAYOFF

Now that you've taken such care building this superbly intelligent form, take a look at how much time it saves for the form user. The charts below show the end result when the Q&A table is filled in several different ways. Note (1) how very little information is asked of the form user; and (2) how impeccably letter-perfect the end result is, each and every time.

First, what happens when the client/plaintiff is a human and the opponent/defendant is a business entity?

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Client	Name of client?	Betty Fisk [she]
ClientParty	What party is the client?	Plaintiff
Opponent	Name of opponent?	AAA Company [it]
OppParty	What party is the opponent?	Defendant



Betty Fisk ("Plaintiff") hereby requests that the Court grant her motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

Or what if the client/defendant is a company and the opponent/plaintiff is a married couple?

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Client	Name of client?	Generics, Inc. [it]
ClientParty	What party is the client?	Defendant
Opponent	Name of opponent?	Bob and Kay Roe [they]
OppParty	What party is the opponent?	Plaintiff



Generics, Inc. ("Defendant") hereby requests that the Court grant its motion and rule against Bob and Kay Roe ("Plaintiffs"). The Plaintiffs have produced no evidence, so they should be required to pay Defendant's attorney fees.

Here the client/plaintiff is a whole mess of people, and the opponent/defendant is one person. But thanks to your form-creating prowess, the grammar continues to be letter-perfect throughout.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Client	Name of client?	John Does #1 through 38 [they]
ClientParty	What party is the client?	Plaintiffs
Opponent	Name of opponent?	Herb Chappe [he]
OppParty	What party is the opponent?	Defendant



John Does #1 through 38 ("Plaintiffs") hereby request that the Court grant their motion and rule against Herb Chappe ("Defendant"). The Defendant has produced no evidence, so he should be required to pay Plaintiffs' attorney fees.

## Example 2: 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. If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.

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

### Step 1. Create the Q&A Table

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

### Step 2. Add Fields

Replace the names in the document with fields:

Select "Terry Vance", click  **Field**, select **Signer**, and click **Insert Field, Done**.

Select "Gena Vance", click  **Field**, select **Spouse**, and click **Insert Field, Done**.

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


### Step 3. Add Conditions

Type an alternate second sentence that will be used when the signer is unmarried.

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

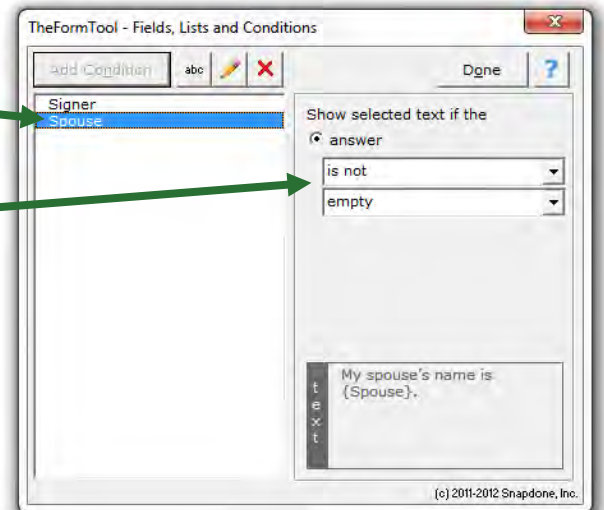
Finally, we'll add two conditions so that the proper second sentence appears when the form is used.

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


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

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

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

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

Take a close look at the markers (colored red here) that now bracket the sentence:

{Spouse<>[empty]:My spouse's name is {Spouse}. }

Condition                      Conditional Text                      End-of-Condition Marker

Everything between the markers is removed from the finished document unless the condition is met. The condition in this case is abbreviated **Spouse<>[empty]**, which can be read: "the Spouse answer is not empty".

### Conditions Are Flexible

If you later change your mind about the material that should be contained within a Condition, feel free to edit it. Type or copy new material between the two markers, or move the markers themselves – there's no need to recreate the Condition from scratch.

To remove a Condition, be sure to delete both the Condition code and its corresponding end-of-condition marker.


Conditions can be *nested* inside other Conditions, but not *overlapped*. That means the innermost end-of-condition marker marks the end of the innermost condition:

**{State=WA:**I live in **{City=SEA:**Seattle, **}**Washington. **}**

Outer Condition      Inner Condition      End of Inner Condition      End of Outer Condition

If the outer condition is false, all of its contents are removed from the finished document – including the whole inner condition, regardless of whether it's true or false.

Returning to our sample form, we'll give the last sentence the same treatment as the preceding one, but with an opposite Condition.

Select the highlighted text, click  **Condition**, select **Spouse**, and click **Add Condition**. This time select **is empty** and click **Done**.

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

The finished form looks like this.

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

## THE PAYOFF

Now look at how the form responds to different circumstances when it is used. When a Spouse is typed, the result looks like this.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
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



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

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

TheFormTool (c) 2011-2012 Snapdone, Inc.		
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.)	



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

### Example 3: Using a List as the Source for a Choice

We'll be turning this document into a form. It requires the name of the company president and includes a list of shareholders. Since the company president is one of the shareholders, we'll present the list of shareholders as choices when selecting the president.

If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document. For best results, change the left margin to indent the signatures rather than using tabs.

The following shareholders attended the meeting:  
Gretel Murphy and Derek Wiley.

The shareholders unanimously elected Gretel Murphy as President of the Company.

Shareholders:


\_\_\_\_\_  
Gretel Murphy


\_\_\_\_\_  
Derek Wiley

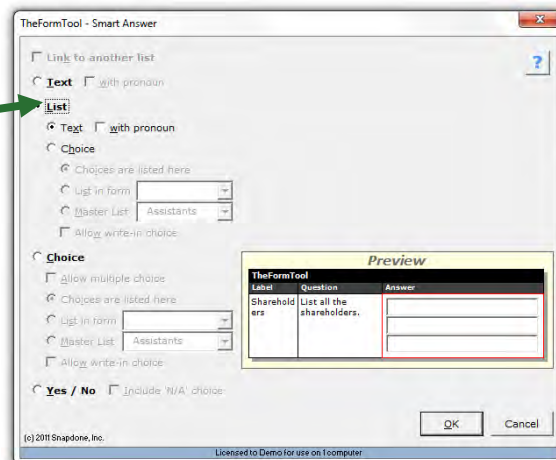
#### Step 1. Create the Q&A Table


TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Shareholders	List all the shareholders.	
President	Who is the president of the company?	

#### Step 2. Create Smart Answers

In the Q&A table, place the cursor in the answer box for the Shareholders question, click  **Answer**, select **List**, and click **OK**.

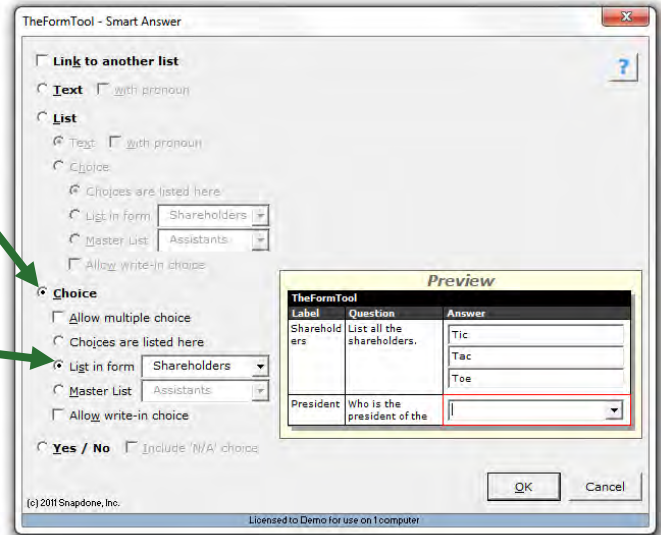
With your cursor still in the answer box for the Shareholders question, click  **Add** a couple times to create some more boxes. This gives the form user an extra visual cue to type more than one shareholder name.



Place the cursor in the answer box for the President question, click  **Answer**, and select **Choice**.


Select **List in form** and note that **Shareholders** is the selected List. (If this Q&A table contained more List answers, you'd be able choose any one of them.)

Click **OK**.



### Step 3. Add a Field to the Form

Now it's time to add fields to the form. Replace the name "Gretel Murphy" with a field for the president's name.

Select **Gretel Murphy** in the second paragraph, click  **Field**, select **President**, and click **Insert Field, Done**.

The following shareholders attended the meeting: Gretel Murphy and Derek Wiley.

The shareholders unanimously elected Gretel Murphy as President of the Company.

Shareholders:

\_\_\_\_\_


Gretel Murphy

\_\_\_\_\_

Derek Wiley

### Step 4. Add Lists to the Form

The list of shareholders appears twice in the form, in two different formats. We'll begin with the narrative list of names.

Select the names in the first paragraph and click  **List**.

The following shareholders attended the meeting: Gretel Murphy and Derek Wiley.

The shareholders unanimously elected [President] as President of the Company.

Shareholders:

\_\_\_\_\_

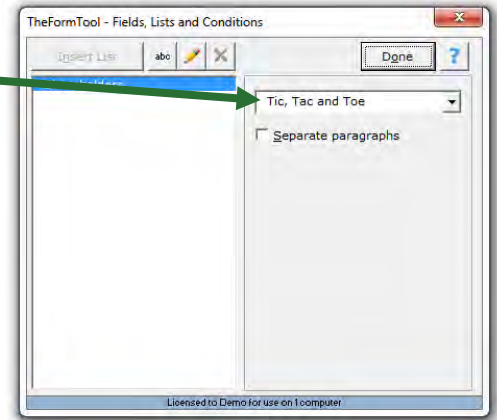
Gretel Murphy

\_\_\_\_\_

Derek Wiley



Select **Tic, Tac, and Toe** from the dropdown box and click **Done**.



A whole List structure has been inserted in the document, including several unfamiliar items: `{List: {Shareholders#X}}`, `{Shareholders#X}|`, and `|`. If you want to skip ahead and learn more about List formats, see Example 6 on page 65, but for now you can just sit back and enjoy the ease with which this List was created.

Next we'll add the signature lines – another List, but using a different format. Select the signatures, click **List**, select **Shareholders**, and click **Insert List**.

This time select **[signature lines]** for the format and click **Done**.

The finished form looks like this.

The following shareholders attended the meeting:  
`{List: {Shareholders#X}}`, `{Shareholders#X}|` and `{Shareholders#X}`.

The shareholders unanimously elected `{President}` as President of the Company.

Shareholders:

\_\_\_\_\_  
 Gretel Murphy

\_\_\_\_\_  
 Derek Wiley

The following shareholders attended the meeting:  
`{List: {Shareholders#X}}`, `{Shareholders#X}|` and `{Shareholders#X}`.

The shareholders unanimously elected `{President}` as President of the Company.

Shareholders:

\_\_\_\_\_  
 Gretel Murphy

\_\_\_\_\_  
 Derek Wiley

The following shareholders attended the meeting:  
`{List: {Shareholders#X}}`, `{Shareholders#X}|` and `{Shareholders#X}`.

The shareholders unanimously elected `{President}` as President of the Company.

Shareholders:

`{List: _____`  
`{Shareholders#X}|`

\_\_\_\_\_  
`{Shareholders#X}|`

\_\_\_\_\_  
`{Shareholders#X}}`

The chart below shows a filled-in Q&A table and the resulting finished document. Note (1) the list of shareholders only had to be typed once, but was used twice in the form; and (2) the form user selected the president in a dropdown box containing shareholder names, so the president's name was used three times in the form but only typed once.

TheFormTool (c) 2011-2012		
Label	Question	Answer
Shareholders	List all the shareholders.	Roger Billings Esther Graves Bea Lester
President	Who is the president of the company?	Esther Graves



The following shareholders attended the meeting: Roger Billings, Esther Graves and Bea Lester.

The shareholders unanimously elected Esther Graves as President of the Company.

Shareholders:

Roger Billings

Esther Graves

Bea Lester

Note that, after typing the shareholders in the first answer box above, the form user must click [Refresh](#) before those names appear as choices in the second answer box. (When the cursor is in the second answer box, a flag appears above the cursor, reminding the form user to "click Refresh to update list".)

## Example 4: Using a Master List

Signature blocks like this appear in lots of forms. Rather than require the form user to type attorney names, bar numbers, and email addresses, we've created a Master List named "Attorneys" to store all that information. (If you haven't already, work through the Master Lists example on page 44 before proceeding.) Now we'll use that Master List to create an elegant, easy form.

If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.


I swear that the above-stated facts are true and correct.

Jackson Gray  
WSBA #12345  
gray@lawfirm.com

### Step 1. Create the Q&A Table

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Signer	Which attorney is signing this document?	

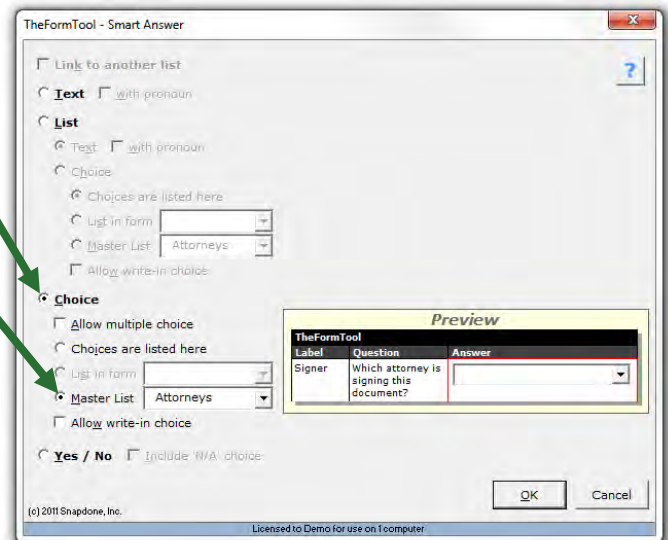
## Step 2. Create a Smart Answer

Place the cursor in the Answer box of the Q&A table, click  **Answer**, and select **Choice**.

Select **Master List** and make sure **Attorneys** is selected.

Click **OK**.

**TOOL TIP:** If the **Attorneys** choice doesn't appear on your screen, you probably haven't created that Master List yet. See "Master Lists" on page 44 for a walk-through.



## Step 3. Add Fields

First we'll add a field for the attorney name.

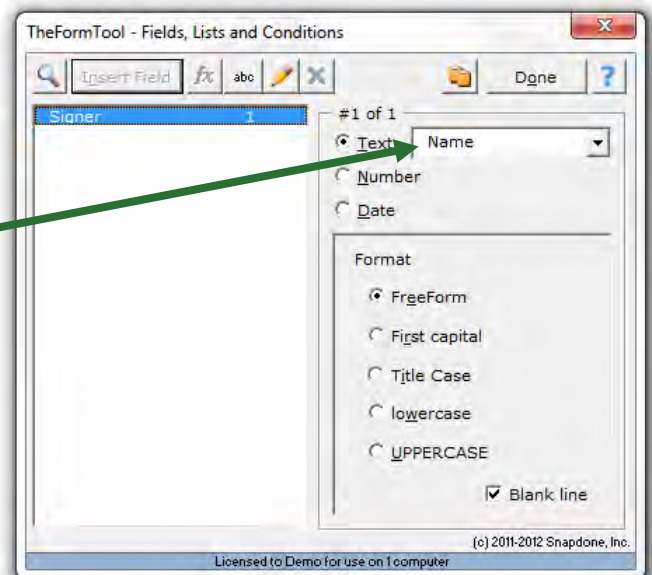
Select **Jackson Gray**, click  **Field**, select **Signer**, and click **Insert Field**.

I swear that the above-stated facts are true and correct.

Jackson Gray  
WSBA #12345  
gray@lawfirm.com

Because the Signer question is tied to a Master List, a new box appears beside **Text**.

Make sure this box says **Name** (because we're currently inserting a field for the attorney's name) then click **Done**.



The finished form looks like this.

I swear that the above-stated facts are true  
and correct.

---

{Signer:Name}  
WSBA #12345  
gray@lawfirm.com

I swear that the above-stated facts are true and correct.

---

{Signer:Name}  
WSBA #12345  
gray@lawfirm.com

I swear that the above-stated facts are true and correct.

---


{Signer:Name}  
WSBA # {Signer:Bar Number}  
gray@lawfirm.com

I swear that the above-stated facts are true and correct.

---

{Signer:Name}  
WSBA #{Signer:Bar Number}  
{Signer:Email}

## THE PAYOFF

All that's required of the form user is to select an attorney from a dropdown box in the Q&A table. When  Fill is clicked, the attorney's name, bar number, and email addressed are all filled in automatically, because the fields are tied to a Master List.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Signer	Which attorney is signing this document?	Jennifer Sykes



I swear that the above-stated facts are true and correct.

---

Jennifer Sykes  
WSBA #293847  
sykes@lawfirm.com

## Example 5: Date Offsets

With Date Offsets, a single date typed in the Q&A table can be used to fill in several related dates in the form.

### Example 5a: Fixed Date Offset

The simplest sort of date offset is a fixed offset. That means that you, the form creator, know exactly how much the date should be offset. In this form we'll ask for a trial date in the Q&A table, then we'll calculate two more dates that are related to it.

If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.

Your trial date is Wednesday, September 14, 2011. Interrogatory answers must be filed 20 business days before trial, on August 15, 2011. Please have your draft answers to me no later than the preceding Friday, August 11, 2011.

#### Step 1. Create the Q&A Table

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
TrialDate	What's the trial date?	

#### Step 2. Add Fields

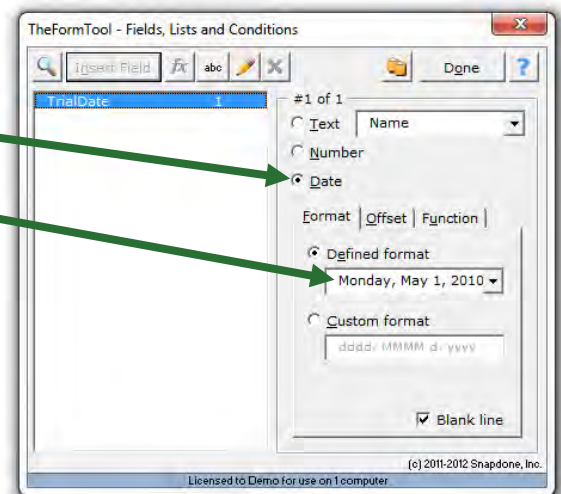
Select the first date, click **Field**, select **TrialDate**, and click **Insert Field** to open the screen below.

Your trial date is Wednesday, September 14, 2011. Interrogatory answers must be filed 20 business days before trial, on August 17, 2011. Please have your draft answers to me no later than the preceding Friday, August 12, 2011.

Select **Date** for the field type.

Select **Monday, May 1, 2010** for the date format.

This first date in the form is the actual trial date, so no offset is needed – click **Done**.



Select the next date and click **Field** to open the screen below.

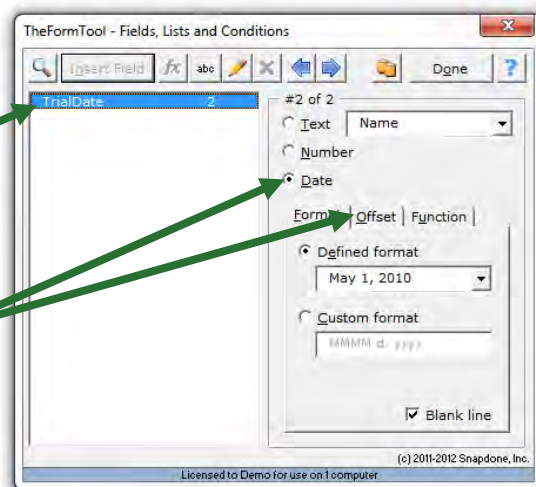
Your trial date is {TrialDate}. Interrogatory answers must be filed 20 business days before trial, on August 17, 2011. Please have your draft answers to me no later than the preceding Friday, August 12, 2011.



This time we'll use a Date Offset to create a Date field that precedes the trial date by 20 business days.

Select **TrialDate** and click **Insert Field**.

Select **Date** and click **Offset** to open the Date Offset screen.

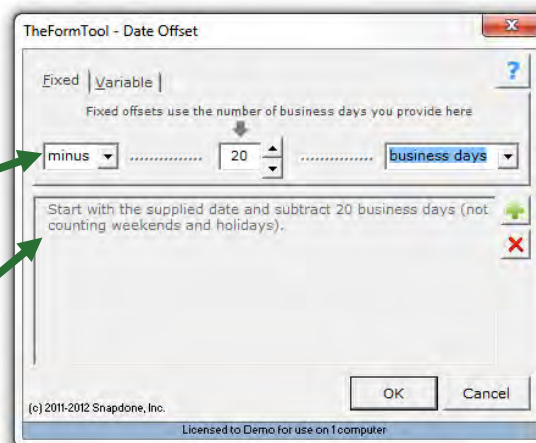


Date Offsets are built one sentence at a time. Most offsets require only one sentence, but you can stack as many sentences as you need.


In this case, we need to subtract 20 business days from the trial date, so select **minus 20 business days** in the three boxes.

Read the Offset description to make sure it's what you intended, then click **OK** to close the Date Offset screen.

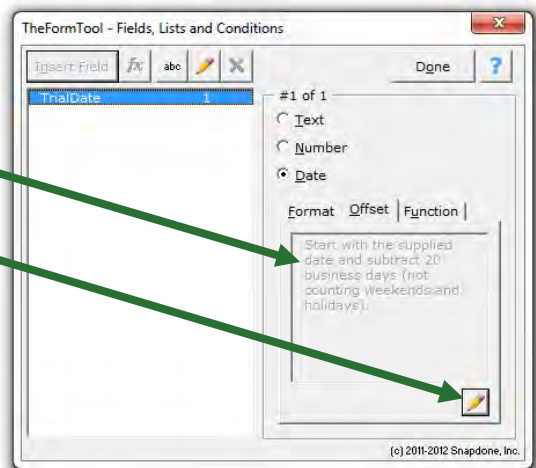
(To change the list of days that count as holidays, see "Holidays" on page 46.)




The offset you created is shown here.

If you need to revise the offset later, click the  pencil to return to the Date Offset screen.

Click **Done**.




For the last date, we need the Friday preceding the day 20 business days before trial – a mouthful, but still a doable and absolutely real-world scenario.

Select the last date, click  **Field**, select **TrialDate**, click **Insert Field**, select **Date**, and click **Offset** to open the Date Offset screen.


Your trial date is {TrialDate}. Interrogatory answers must be filed 20 business days before trial, on {TrialDate (offset)}. Please have your draft answers to me no later than the preceding Friday, August 12, 2011.

The first sentence of this offset is identical to the last one, so once again select **minus 20 business days** in the three boxes.

To add a second sentence to the Offset, click  plus.

The next sentence needs to take us to the preceding Friday, so select **go to preceding Friday** in the dropdown boxes.


Read the Offset description to make sure it's what you intended, then click **OK** to close the Date Offset screen, and **Done**.

(If you ever need to back up a step while building a Date Offset, click  to remove the last sentence.)

Your trial date is {TrialDate}. Interrogatory answers must be filed 20 business days before trial, on {TrialDate (offset)}. Please have your draft answers to me no later than the preceding Friday, {TrialDate (offset)}.

The finished form looks like this.

### Readability, continued

Once again, note that the two {TrialDate (offset)} fields look identical, even though they're not. To see the full details of any field (and modify them if you like), select the field and click  **Field**.

In the chart below, notice how little the form user has to type into the Q&A table, and how much information is provided in the resulting document.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
TrialDate	What's the trial date?	11/3/11



Your trial date is Thursday, November 3, 2011. Interrogatory answers must be filed 20 business days before trial, on October 5, 2011. Please have your draft answers to me no later than the preceding Friday, September 30, 2011.

## Example 5b: Variable Date Offsets

Variable date offsets allow even more flexibility. In addition to asking the form user for a starting date, you can also ask for the offset amount. This form will use a variable date offset to determine the ending date of a lease term.

If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.

Lessor leases the Premises to Lessee for a Term of 3 years, beginning on March 11, 2012, and ending on March 11, 2015.

### Step 1. Create the Q&A Table

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Date	What is the lease commencement date?	
Term	How many years long is the term?	

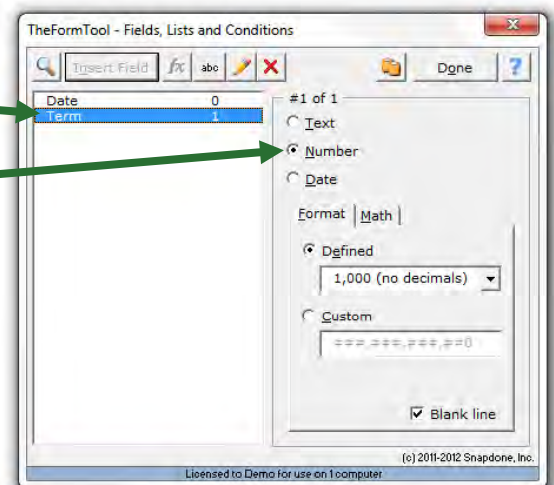
### Step 2. Add Fields

The first field is an ordinary number field. Select the number **3** and click **Field** to open the screen below.

Lessor leases the Premises to Lessee for a Term of 3 years, beginning on March 11, 2012, and ending on March 11, 2015.

Select **Term** and click **Insert Field**.

Select **Number** for the field type and click **Done**.

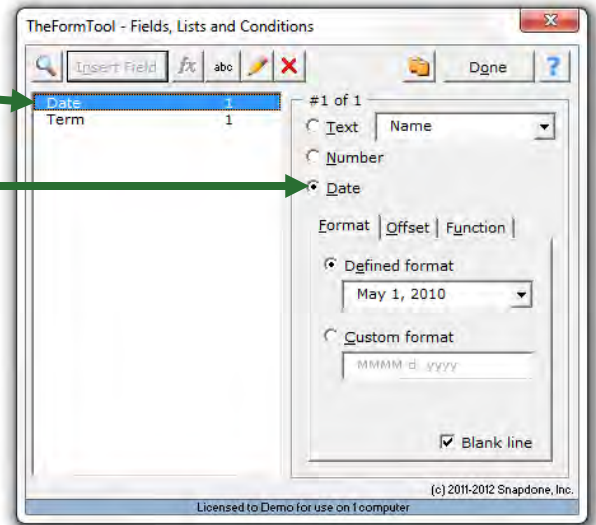


The next field is an ordinary date field. Select the date and click **Field** to open the screen below.

Lessor leases the Premises to Lessee for a Term of {Term} years, beginning on March 11, 2012, and ending on March 11, 2015.

Select **Date** and click **Insert Field**.

Select **Date** for the field type and click **Done**.



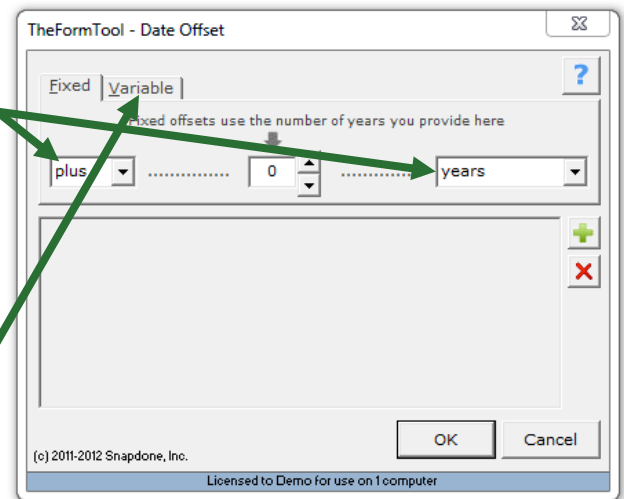
The last field will use a variable date offset to determine the ending date of the loan term. Select the highlighted date, click **Field**, select **Date**, and click **Insert Field**, then select **Date** and click **Offset** to open the Date Offset screen.

Lessor leases the Premises to Lessee for a Term of {Term} years, beginning on {Date}, and ending on March 11, 2015.

We're going to add a number of years to the date, so select **plus** in the first box and **years** in the third box.

In this example, you don't know how long the loan term will be. That information will be provided later by the form user.

So instead of creating a fixed offset, click **Variable** to create a variable offset.



Select **Term** in the center box. The form user's response to the Term question in the Q&A table will be used in this date offset to add an appropriate number of years to the commencement date.

Notice that the number of years in the offset description is indicated with a **{Term}** field.

Click **OK** to close the Date Offset screen, then **Done**.

The finished form looks like this.

Lessor leases the Premises to Lessee for a Term of {Term} years, beginning on {Date}, and ending on {Date (offset)}.

## THE PAYOFF

Two responses in the Q&A table are used to calculate a third item in the finished document.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Date	What is the lease commencement date?	6/8/12
Term	How many years long is the term?	10



Lessor leases the Premises to Lessee for a Term of 10 years, beginning on June 8, 2012, and ending on June 8, 2022.

### Example 5c: Date Offset Combined with Date Function

This example uses a Date Function to determine the earliest in a list of dates, then applies a Date Offset to determine a date one year later.

If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.


All trust proceeds shall be dispersed by May 16, 2010, the date one year after the youngest beneficiary's 18th birthday.

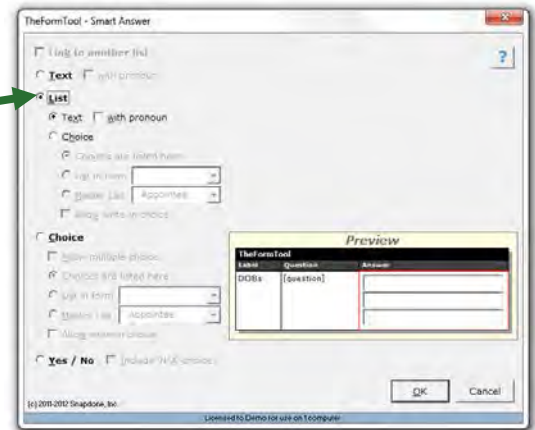
#### Step 1. Create the Q&A Table

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
DOBs	List the beneficiaries' birth dates	



## Step 2. Create a Smart Answer

Place the cursor in the Answer box of the Q&A table, click  **Answer**, select **List**, and click **OK**.

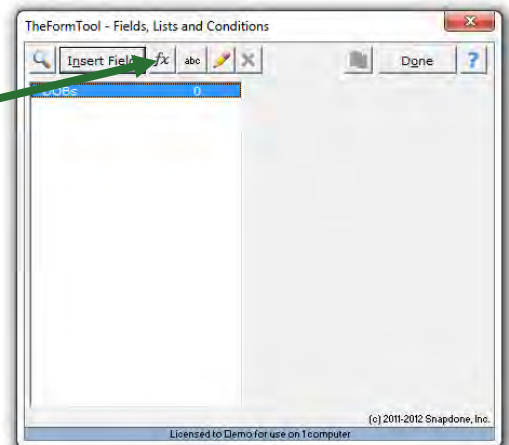


## Step 3. Add a Field


Select the date and click  **Field** to open the screen below.

All trust proceeds shall be dispersed by **May 16, 2010**, the date one year after the youngest beneficiary's 18th birthday.

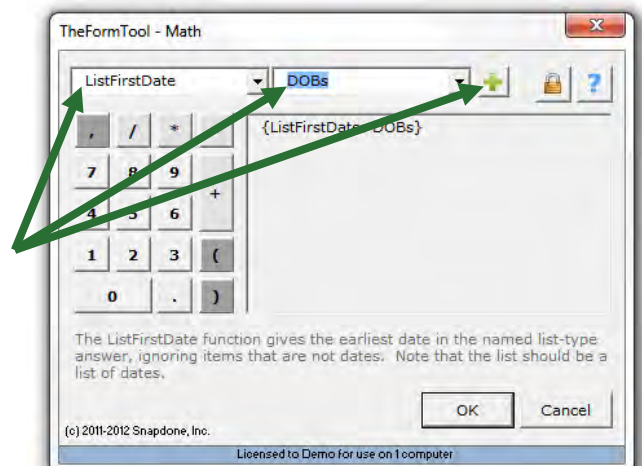
We'll use a shortcut here. Instead of clicking **Insert Field**, selecting **Date**, and clicking **Function**, just click **fx** to go straight to the Math screen.



The ListFirstDate function (page 29) gives the earliest date in a list of dates. We'll use it to provide the birthdate of the youngest beneficiary.

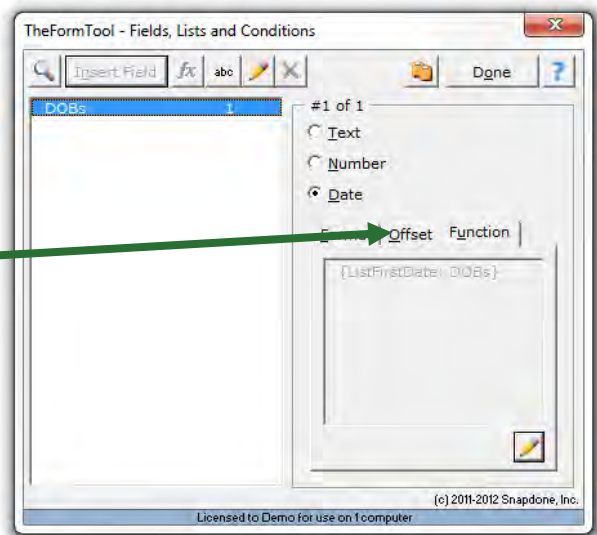
Select **ListFirstDate**, **DOBs**, and click  plus to add the function to the formula.

Click **OK** to close the Math screen.

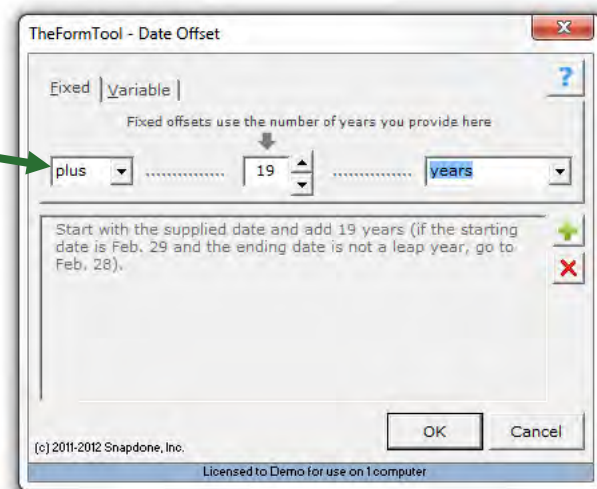


Now that we have the birthdate of the youngest beneficiary, we need to offset it by 19 years, to give the date one year after the 18th birthday.

Click **Offset** to open the Date Offset screen.



Select **plus 19 years**.



Click **OK** to close the Date Offset screen, then **Done**.

The finished form looks like this.

All trust proceeds shall be dispersed by {#/#/# (offset)}, the date one year after the youngest beneficiary's 18th birthday.

## THE PAYOFF

The form automatically analyzes a whole list of dates to produce the correct result.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
DOBs	List the beneficiaries' birth dates	4/14/1998 6/6/2000 2/5/1997



All trust proceeds shall be dispersed by February 5, 2016, the date one year after the youngest beneficiary's 18th birthday.

## Example 6: Custom Lists

The **FormTool** includes several List formats that you can create with a single click (see page 21). But in some cases you may want to craft your own List format. Two such examples are shown below, but first we must introduce the Three Clauses.

### Three Clauses in Every List

Before creating a custom List, look closely at this standard List that was created by selecting one of the built-in formats in the **List** screen.

I leave the remainder of my estate to my children: {List:{Kids#X}|, {Kids#X}| and {Kids#X}}.

Every List contains three clauses separated by markers (the markers are colored red below):

{List:{Kids#X}|, {Kids#X}| and {Kids#X}}

First Clause                      Middle Clause                      Last Clause

Having three clauses gives flexibility when crafting Lists. For example, in the List shown above, the middle clause includes a comma, and the last clause includes “and”. With four kids, the resulting List looks like this: Andy, Betty, Carl and Debra. (There are two commas, because the middle clause appears twice, because there are two middle kids.)

Look at two more sample Lists below, and their results for four kids. Notice that the middle clause appears twice in each sample, because there are two middle kids.

This custom List ...		... creates this finished product
{List:My firstborn child is {Kids#X} , the next oldest is {Kids#X}  and the youngest is {Kids#X}}.	➡	My firstborn child is Andy, the next oldest is Betty, the next oldest is Carl, and the youngest is Debra.
The remainder of my estate is divided as follows: {List:One equal share to {Kids#X} ; One equal share to {Kids#X} ; and One equal share to {Kids#X}}.	➡	The remainder of my estate is divided as follows: One equal share to Andy; One equal share to Betty; One equal share to Carl; and One equal share to Debra.

### Example 6a: Item-in-List Fields

The “Field Types” section on page 12 discusses six types of fields. But The **FormTool** secretly contains a seventh type of field that appears only within Lists: the Item-in-List field. You’ve seen several examples of it already – any field that includes “#X”, like {Kids#X} above.


We'll use Item-in-List fields to turn this document into a form. If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.


I leave the remainder of my estate to my children: Andy (born January 1, 1991), Betty (born February 2, 1992), Carl (born March 3, 1993) and Debra (born April 4, 1994).

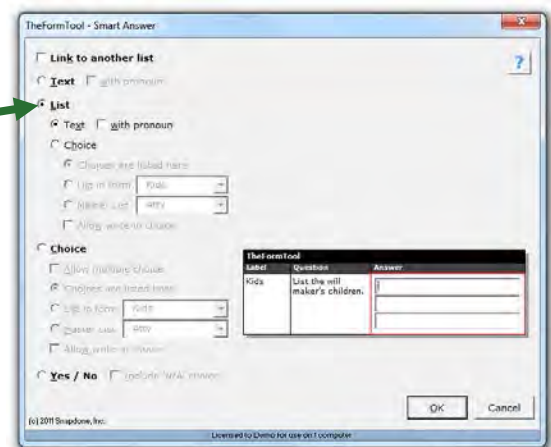
### Step 1. Create the Q&A Table


TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Kids	List the will maker's children.	
DOB	What's each child's date of birth?	

### Step 2. Create Smart Answers

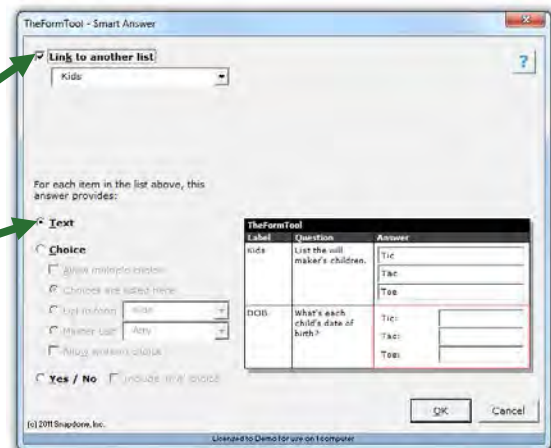
Place the cursor in the answer box for the Kids question, click  **Answer**, select **List**, and click **OK**.

With your cursor still in the answer box for the Kids question, click  **Add** a couple times to create some more boxes. This gives the form user an extra visual cue to type more than one child's name.



Place the cursor in the answer box for the DOB (date of birth) question, click  **Answer**, and select **Link to another list**. Note that **Kids** is selected – it's the only List answer that occurs in this Q&A table.

Make sure **Text** is selected and click **OK**.



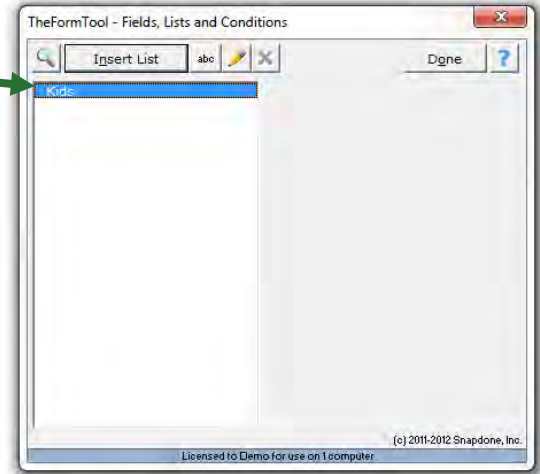
### Step 3. Add a List

We'll add one of the built-in List formats to the form as a starting point, then customize it.

Select the text highlighted here and click  **List** to open the screen below.

I leave the remainder of my estate to my children: Andy (born January 1, 1991), Betty (born February 2, 1992), Carl (born March 3, 1993) and Debra (born April 4, 1994).

Make sure **Kids** is selected and click **Insert List, Done**.



Now it's time to customize this List. In each of the three clauses, we'll add "(born \_\_\_\_)" after the {Kids#X} field.

I leave the remainder of my estate to my children: {List:{Kids#X}}, {Kids#X} and {Kids#X}.

In the first clause: Type "(born \_\_\_\_)" after the {Kids#X} field. (The large font is used here to draw your attention to the first clause, but you don't need to use a large font in your form.)

I leave the remainder of my estate to my children: {List:**{Kids#X} (born \_\_\_\_)**}, {Kids#X} and {Kids#X}.

In the middle clause: Type "(born \_\_\_\_)" after the {Kids#X} field.

I leave the remainder of my estate to my children: {List:{Kids#X} (born \_\_\_\_)}, **{Kids#X} (born \_\_\_\_)** and {Kids#X}.

In the last clause: Type "(born \_\_\_\_)" after the {Kids#X} field.

I leave the remainder of my estate to my children: {List:{Kids#X} (born \_\_\_\_)}, {Kids#X} (born \_\_\_\_) **and {Kids#X} (born \_\_\_\_)**).

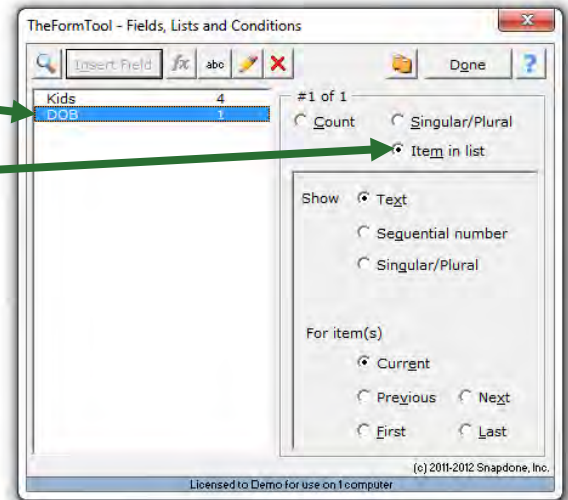
Finally, we'll replace each blank with an Item-in-List field for the date of birth. Select the first blank and click **Field** to open the screen below.

I leave the remainder of my estate to my children: {List:{Kids#X} (born **[Field]**)}, {Kids#X} (born \_\_\_\_)} and {Kids#X} (born \_\_\_\_)}.



Select **DOB**, and click **Insert Field**.

Select **Item in list** and click **Done**.



Notice the new **{DOB#X}** field. Let's change its format so the date is spelled out. Select the first field (or place the cursor anywhere in it) and click **Field**, select **Date**, select **May 1, 2010**, and click **Done**.

Use the same steps to replace the remaining two blanks with identical **{DOB#X}** fields. (Or, if you don't need the repetition for practice, you can copy-and-paste the first **{DOB#X}** field to the other two locations.)

I leave the remainder of my estate to my children: **{List:{Kids#X} (born {DOB#X}) |, {Kids#X} (born \_\_\_\_ ) | and {Kids#X} (born \_\_\_\_ )}**.

When all three blanks have been replaced, the form looks like this. Note that each of the three List clauses contains both a **{Kids#X}** field for the name and a **{DOB#X}** field for the date.

I leave the remainder of my estate to my children: **{List:{Kids#X} (born {DOB#X}) |, {Kids#X} (born {DOB#X}) | and {Kids#X} (born {DOB#X})}**.

## THE PAYOFF

No matter how many children are typed in the Q&A table, the custom List expands to accommodate them, and includes supplemental information (a birthdate) for each.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Kids	List the will maker's children.	Helen Rufus Penelope
DOB	What's each child's date of birth?	Helen: 1/1/91 Rufus: 2/2/92 Penelope: 3/3/93



I leave the remainder of my estate to my children: Helen (born January 1, 1991), Rufus (born February 2, 1992) and Penelope (born March 3, 1993).

Note that, after typing the kids in the first answer box above, the form user must click **Refresh** before those names appear in the second answer box. (When the cursor is in the second answer box, a flag appears above the cursor, reminding the form user to "click Refresh to update list".)

## Example 6b: First, Previous, Current, Next, and Last

Custom Lists can be created to automatically handle even the fiddliest of situations – the parts you always had to do by hand before. Consider this document.

If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.

The first sentence refers to the first personal representative.

The second sentence refers to the first and second personal representatives.

And the third sentence refers to the second and third personal representatives.

I select Alan Avery as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.

I select **Alan Avery** as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.


I select Alan Avery as my personal representative. **If Alan Avery is unable or unwilling to serve, then I select Brenda Blake.** If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.


I select Alan Avery as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. **If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.**

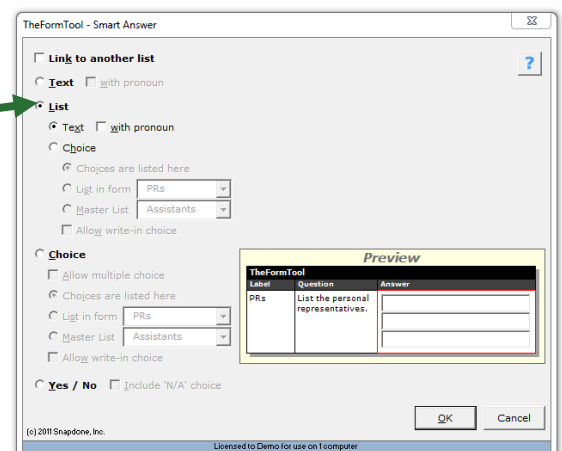
### Step 1. Create the Q&A Table

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
PRs	List the personal representatives.	

### Step 2. Create a Smart Answer

Place the cursor in the answer box for the PRs question, click  **Answer**, select **List**, and click **OK**.

With your cursor still in the answer box for the PRs question, click  **Add** a couple times to create some more boxes. This gives the form user an extra visual cue to type more than one personal representative's name.



### Step 3. Add a List

As in the last example, we'll begin by adding one of the built-in List formats to the form as a starting point, then customize it.

Select this whole passage, click **List**, select **PRs**, and click **Insert List, Done**.

This is just the bare bones of a List. Now we'll add some text to each of the three clauses.

Add to the first clause as shown here. (The large font is used here to draw your attention to the first clause, but you don't need to use a large font in your form.)

Change the second clause to look like this.

And finally, the third clause should look like this.

Two blanks remain to be filled in before we're done. The first blank appears in clause #2. We need to fill it in with the name of the personal representative that appears in clause #1 – the *previous* clause. Select the blank and click **Field** to open the screen below.

Select **PRs** and click **Insert Field**.

Select **Item in list**.

Select **Previous** and click **Done**.

I select Alan Avery as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.

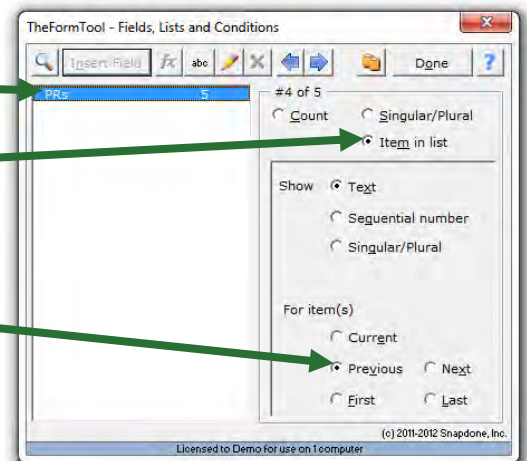
{List:{PRs#X}}, {PRs#X} and {PRs#X}

{List:I select {PRs#X} as my personal representative. {PRs#X} and {PRs#X}


{List:I select {PRs#X} as my personal representative. If \_\_\_\_ is unable or unwilling to serve, then I select {PRs#X}. and {PRs#X}

{List:I select {PRs#X} as my personal representative. If \_\_\_\_ is unable or unwilling to serve, then I select {PRs#X}. If \_\_\_\_ is unable or unwilling to serve, then I select {PRs#X}.

{List:I select {PRs#X} as my personal representative. If \_\_\_\_ is unable or unwilling to serve, then I select {PRs#X}. If \_\_\_\_ is unable or unwilling to serve, then I select {PRs#X}.



Notice that the field you just created contains a #P: {PRs#P}. The P stands for Previous. That means the personal representative in the previous clause will be inserted here.


Select the remaining blank and use the same steps to create another {PRs#P} field: click  **Field, PRs, Insert Field, Item in list, Previous, Done.**

{List:I select {PRs#X} as my personal representative. If {PRs#P} is unable or unwilling to serve, then I select {PRs#X}. If is unable or unwilling to serve, then I select {PRs#X}.

{List:I select {PRs#X} as my personal representative. If {PRs#P} is unable or unwilling to serve, then I select {PRs#X}. If is unable or unwilling to serve, then I select {PRs#X}.

Shave Some Clicks Off Your Time

In these examples, we’ve been creating each field from scratch because it’s good practice. But once you’re comfortable with the process, you can often save time by simply copying and pasting things.

In that last step, for example, rather than click  **Field, PRs, Insert Field, Item in list, Previous, Done**, you could just copy the first {PRs#P} field and paste it where the second one belongs.

The finished form looks like this.

{List:I select {PRs#X} as my personal representative. If {PRs#P} is unable or unwilling to serve, then I select {PRs#X}. If {PRs#P} is unable or unwilling to serve, then I select {PRs#X}.

THE PAYOFF

The List expands depending on the number of personal representatives typed into the Q&A table.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
PRs	List the personal representatives.	Humphrey Cogg



I select Humphrey Cogg as my personal representative.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
PRs	List the personal representatives.	Humphrey Cogg Ella Grendle



I select Humphrey Cogg as my personal representative. If Humphrey Cogg is unable or unwilling to serve, then I select Ella Grendle.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
PRs	List the personal representatives.	Humphrey Cogg Ella Grendle Stanley Frock Quentin Lacrosse



I select Humphrey Cogg as my personal representative. If Humphrey Cogg is unable or unwilling to serve, then I select Ella Grendle. If Ella Grendle is unable or unwilling to serve, then I select Stanley Frock. If Stanley Frock is unable or unwilling to serve, then I select Quentin Lacrosse.

## Example 7: Math


We'll use TheFormTool's math feature to automate this form. If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.

The loan amount is \$\_\_\_\_, to be paid in \_\_\_\_  
monthly payments of \$\_\_\_\_ each.

### Step 1. Create the Q&A Table

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Amount	Amount of loan?	
Rate	Annual Interest rate?	
Term	How many years long is the loan term?	

### Step 2. Add Fields

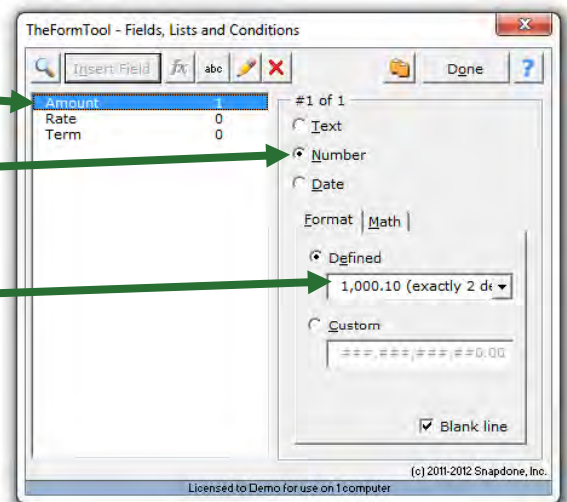
The first field requires no math. Select the highlighted blank and click  **Field** to open the screen below.

The loan amount is \$\_\_\_\_, to be paid in \_\_\_\_  
monthly payments of \$\_\_\_\_ each.


Select **Amount** and click **Insert Field**.

Select **Number**.

Select the format **1,000.10 (exactly 2 decimals)** and click **Done**.



The next field is the number of months in the loan term. Since the Q&A table's Term answer provides the number of years, we'll use math to multiply that number by 12.

Select the highlighted blank and click  **Field** to open the screen below.

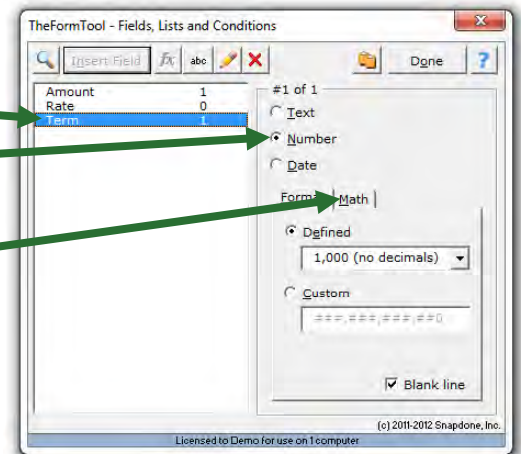
The loan amount is \${Amount}, to be paid in \_\_\_\_  
monthly payments of \$\_\_\_\_ each.



Select **Term** and click **Insert Field**.

Select **Number**.

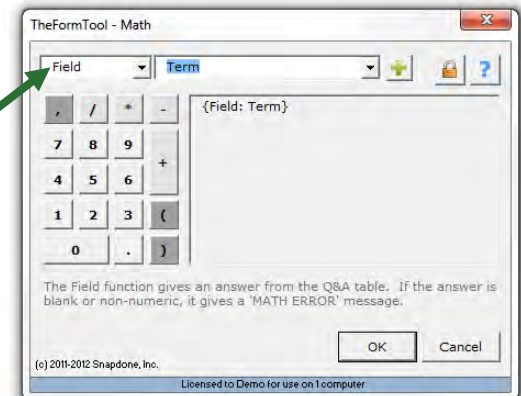
Click **Math** to open the Math screen.



This is where the formula is built. The first number we need is the number of years in the loan term, labeled “Term” in the Q&A table.

Select the function **Field: Term**, and click **+** plus to add it to the formula.

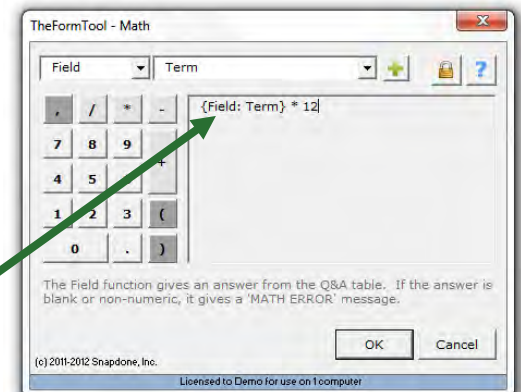
When the form is filled in, this function will retrieve the number typed in response to the question “How many years long is the loan term?”



Since we want to multiply the number of years by 12, add **\* 12** at the end of the formula. (The asterisk character is used for multiplication, just as plus is used for addition, hyphen for subtraction, and forward slash for division.)

You can either add **\* 12** by clicking the **\***, **1**, and **2** buttons in the Math screen, or you can type those three characters on your keyboard.

When finished, the formula will look like this. Click **OK** to close the Math screen.

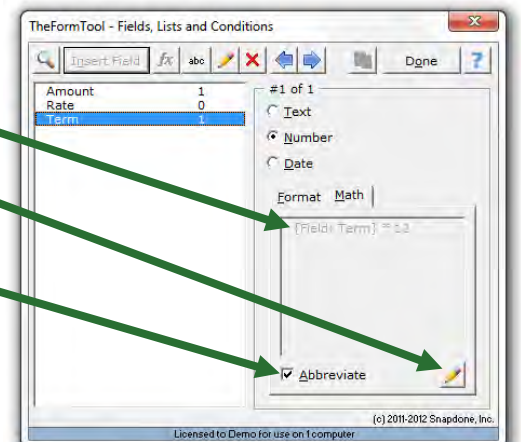



The formula you created is shown here.

If you need to edit the formula later, click the **pencil** to return to the Math screen.

The Abbreviate checkbox has no impact on finished documents, but controls how a formula is displayed in the form. In this example, the field we’re creating will either be abbreviated as **{###}** or displayed in full as **{{Field: Term} \* 12}**.

Click **Done**.



Finally, we'll use the Payment function to calculate the monthly payment. Select the highlighted blank and click  **Field** to open the screen below.

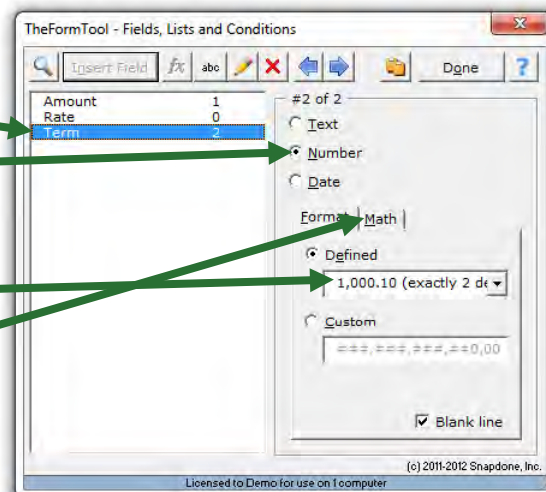
The loan amount is \$**{Amount}**, to be paid in **{###}** monthly payments of \$ **\_\_\_\_\_** each.


Select **Term** and click **Insert Field**.

Select **Number**.

Since this is a dollar amount, choose the format **1,000.10 (exactly 2 decimals)**.

Click **Math** to open the Math screen.

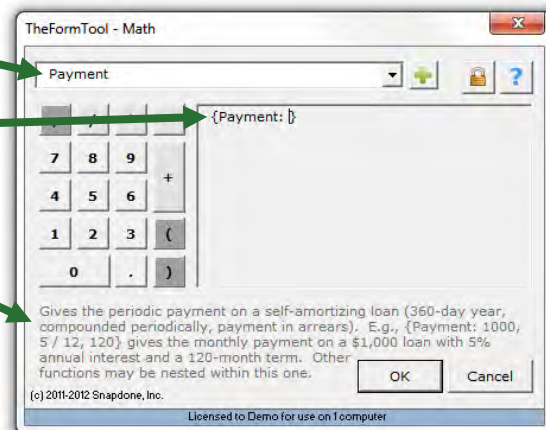


Select the **Payment** function and click  plus to add it to the formula.


Note that your cursor is flashing inside the **{Payment: }** function.

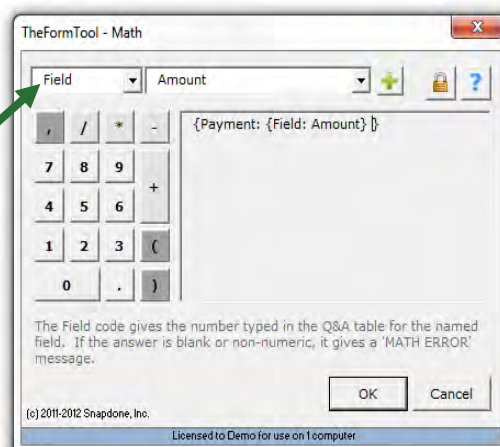
As indicated at the bottom of the screen, the Payment function requires three numbers separated by commas: loan amount, periodic interest rate, and the number of periods in the term of the loan. Those numbers can either be typed directly into the formula or they can be represented with other functions.

In this example, we'll use a Field function for each of the three numbers required in the Payment function.

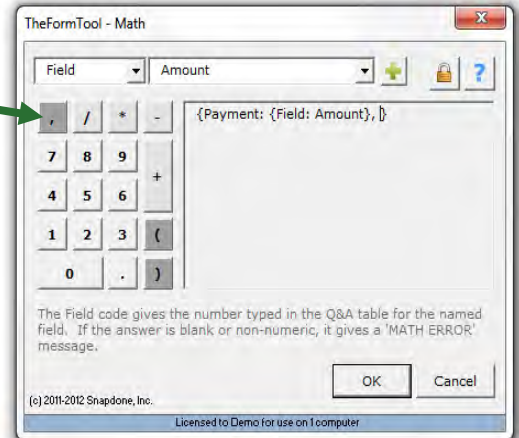


The first number required by the Payment function is the loan amount.

Make sure the cursor is still placed within the Payment function as shown above, then select **Field**, **Amount**, and click  plus.

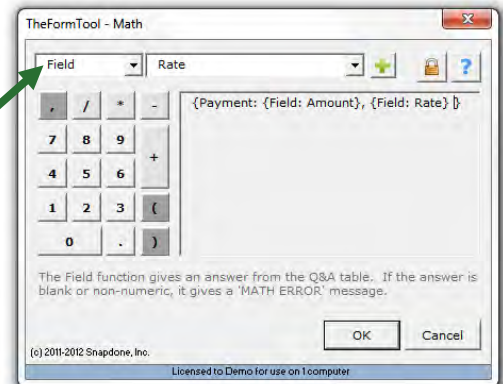


Click the **comma** button (or press the comma key on your keyboard) to add the required comma before the Payment function's second number.



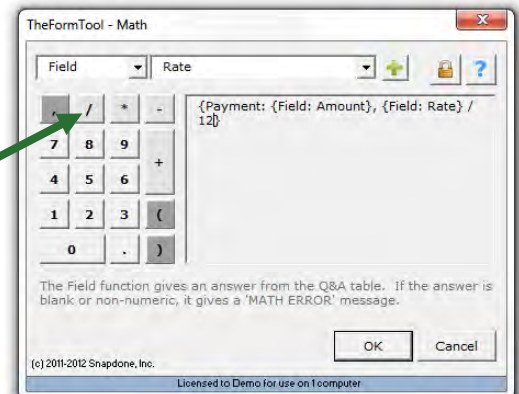
The next number required by the Payment function is the periodic interest rate.

Select **Field**, **Rate**, and click **+** plus to add the **{Field: Rate}** function.

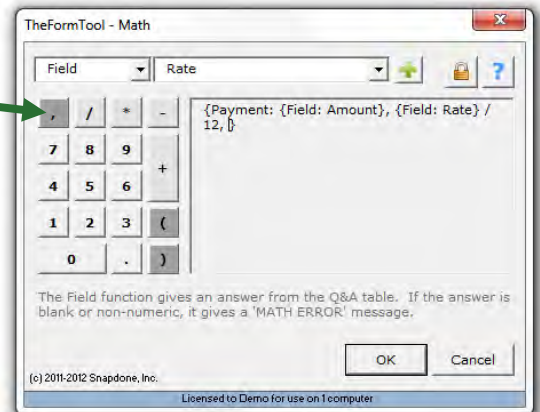


Since the Q&A table asks for an annual interest rate, we'll divide it by 12 to get the periodic (monthly) interest rate.

Click the **slash**, **1**, and **2** buttons or type **/12** on your keyboard.

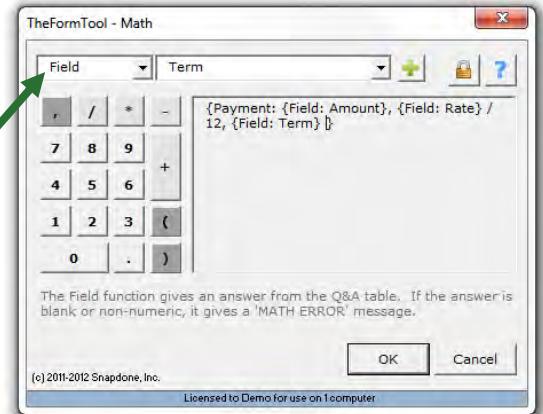


Click the **comma** button (or press the comma key on your keyboard) to add the required comma before the Payment function's third number.



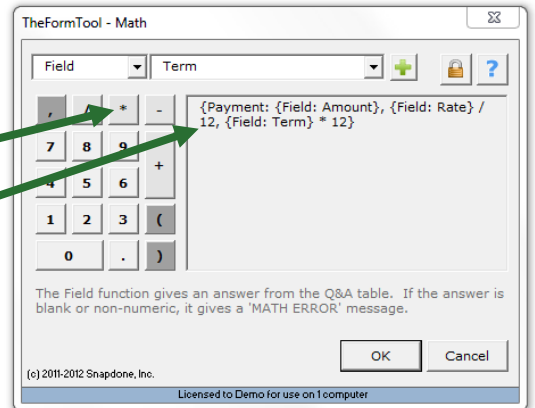
The last number required by the Payment function is the number of periods in the loan term.

Select **Field**, **Term**, and click **+** plus to add the **{Field: Term}** function.



Since the Q&A table asks for the loan term in years, we'll multiply it by 12 to get the number of monthly periods in the loan.

Click the **\***, **1**, and **2** buttons or type **\*12** on your keyboard.



The finished formula looks like this.

Click **OK** to close the Math screen, then **Done**.

If you chose to abbreviate the two math fields, the finished form looks like this.

The loan amount is \${Amount}, to be paid in {###} monthly payments of \${###} each.

If you chose not to abbreviate, the finished form looks like this.

The loan amount is \${Amount}, to be paid in {{Field: Term} \* 12} monthly payments of \${{Payment: {Field: Amount}, {Field: Rate} / 12, {Field: Term} \* 12}} each.

## THE PAYOFF

When the form user supplies loan amount, annual interest rate, and loan term, the number of payments and monthly payment amount are calculated automatically.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Amount	Amount of loan?	150,000
Rate	Annual interest rate?	4.5
Term	How many years long is the loan term?	20



The loan amount is \$150,000, to be paid in 240 monthly payments of \$948.97 each.



## Example 8: Linked List, Repeating Paragraphs, and Math

This example uses a custom list, so read through Example 6 on page 65 first.

We'll use linked lists, repeating paragraphs, and math to automate this form. If you'd like to work along with this example, begin by typing (or copying) the text shown here into a blank document.

The shareholders are as follows:

Madge Dunfey owns 50 shares (current value \$350.00), giving her 55.6% ownership of the company.

Herb Billings owns 25 shares (current value \$175.00), giving him 27.8% ownership of the company.


Grace Phinn owns 15 shares (current value \$105.00), giving her 16.7% ownership of the company.

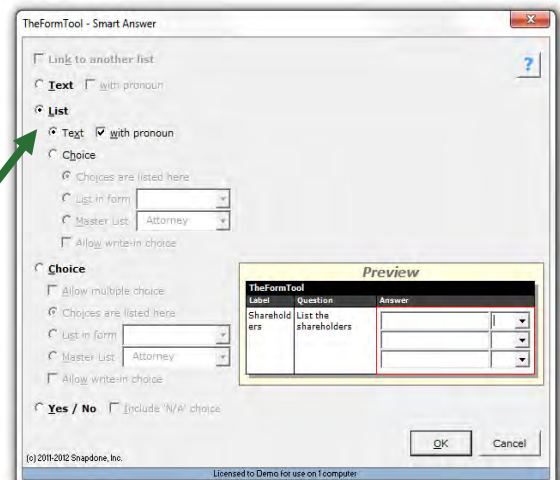
### Step 1. Create the Q&A Table

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Shareholders	List the shareholders.	
SharesHeld	How many shares does each shareholder own?	
ShareValue	What's the current value of 1 share?	


### Step 2. Create Smart Answers

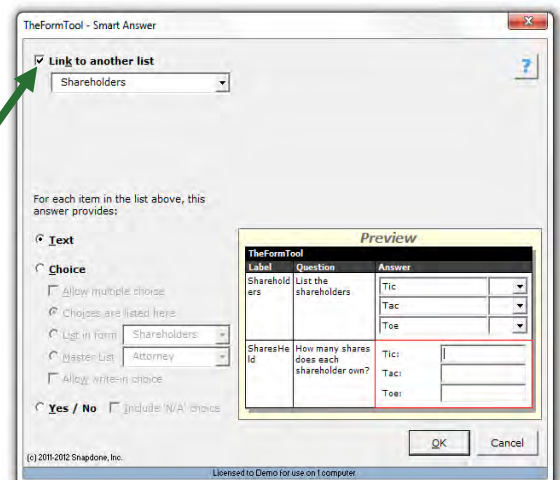
The first answer will be a list-type answer with pronouns (because the form includes a "him/her" pronoun for each shareholder).

Place the cursor in the answer box for the Shareholders question, click  **Answer**, select **List, Text, with pronoun**, and click **OK**.



The second answer asks for additional information about each shareholder, so it will be linked to the Shareholder answer.

Place the cursor in the answer box for the SharesHeld question, click  **Answer**, select **Link to another list**, and click **OK**.



### Step 3. Add a List

We'll start with one of the built-in List formats then customize it.

Select the three paragraphs that will be replaced by the list and click **List, Insert List** to open the screen below.

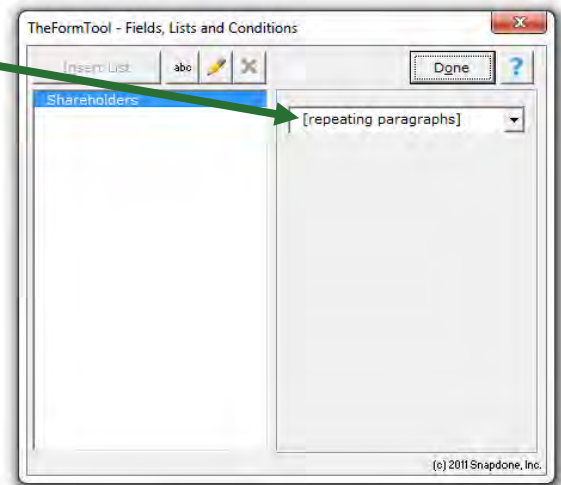
Select **[repeating paragraphs]** and click **Done**.

The shareholders are as follows:

Madge Dunfey owns fifty (50) shares (current value \$350.00), giving her \_\_% ownership of the company.

Herb Billings owns twenty-five (25) shares (current value \$350.00), giving him \_\_% ownership of the company.

Grace Phinn owns fifteen (15) shares (current value \$350.00), giving her \_\_% ownership of the company.



Now that we have a framework for the list, we'll begin customizing it.

The shareholders are as follows:

{List:Sample paragraph about {Shareholders#X}.

[[ditto]][ditto]]

#### Abbreviated Repeating Lists

When each item in a list is identical, the second and third clauses can be abbreviated with **[ditto]**, as shown above.

**{Shareholders#X}** is the marker that shows where each shareholder's name will be inserted. Preserve that marker, but edit the surrounding text to create the paragraph shown here. (In other words, delete "Sample paragraph about" before the marker, and add "owns \_\_ (\_\_) shares (current value \$\_\_), giving him/her \_\_% ownership of the company" after the marker.)


The shareholders are as follows:

{List:{Shareholders#X} owns \_\_ (\_\_) shares (current value \$\_\_), giving him/her \_\_% ownership of the company.

[[ditto]][ditto]]



## Step 4. Add Fields

All that remains is to add some fields. Start with the pronoun field. Select **him/her** and click  **Field** to open the screen below.

The shareholders are as follows:

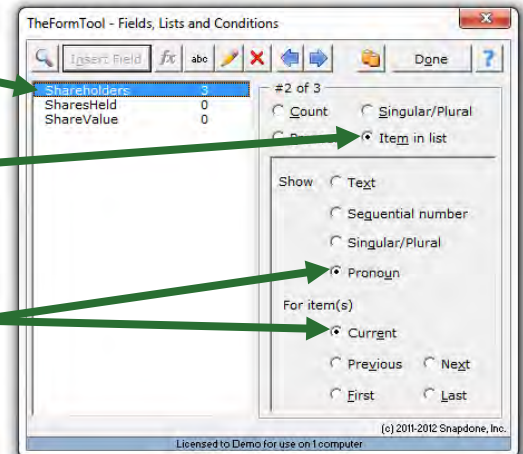
{List:{Shareholders#X} owns \_\_ (\_\_) shares (current value \$\_\_), giving him/her \_\_% ownership of the company.

[[ditto]][ditto]]

Select **Shareholders** and click **Insert Field**.

We want the pronoun “him” or “her” for a particular person in the list (not the pronoun “they” that would apply *all* of the people in the list), so select **Item in list**.

Select **Pronoun** and make sure **Current** is selected. This will give us the pronoun that applies to the current person in the list. So the first paragraph in the finished document will use the pronoun for person #1, the second paragraph will use the pronoun for person #2, etc. Click **Done**.



The default pronoun field {He|She} is not what we want here, so click  **Field** a second time to fine-tune it.

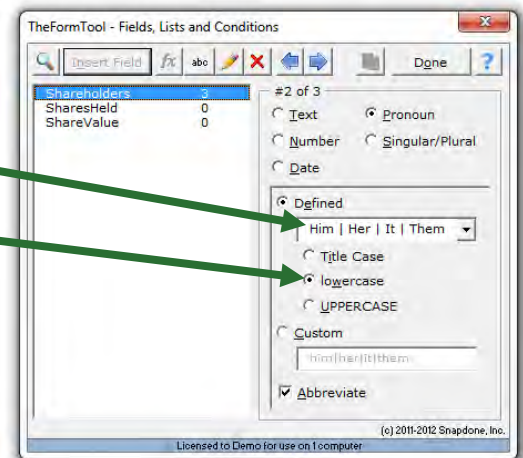
The shareholders are as follows:


{List:{Shareholders#X} owns \_\_ (\_\_) shares (current value \$\_\_), giving {He|She} \_\_% ownership of the company.

[[ditto]][ditto]]

Select **Him|Her|It|Them**.

Select **lowercase** and click **Done**.



Next we'll add fields for the number of shares owned – first using words, then using numerals. Select the highlighted blank and click  **Field** to open the screen below.

The shareholders are as follows:

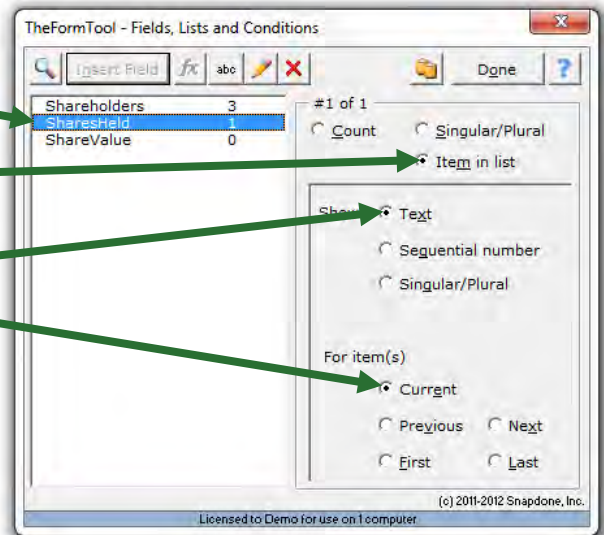
{List:{Shareholders#X} owns    (\_\_) shares (current value \$\_\_), giving {him|her} \_\_% ownership of the company.

[[ditto]][ditto]]

Select **SharesHeld** and click **Insert Field**.

Select **Item** in list.

Select **Text**, **Current** and click **Done**.



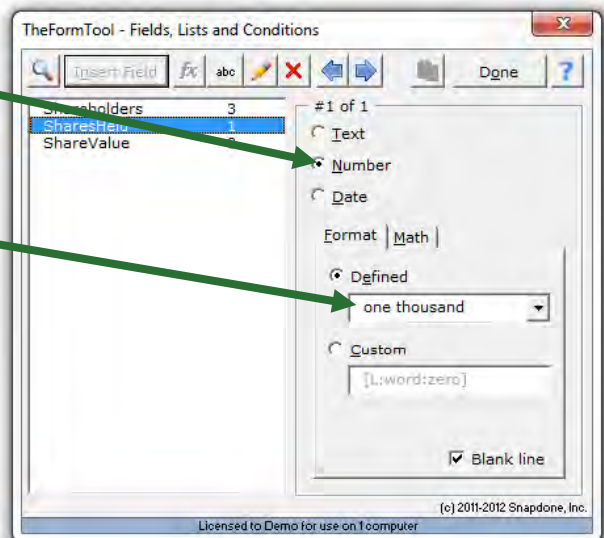
This first occurrence of the number of shares needs to be spelled out in words. With the **{SharesHeld#X}** field selected, click **Field** a second time to fine-tune it.

The shareholders are as follows:

{List:{Shareholders#X} owns  
{SharesHeld#X} ( ) shares (current value \$ \_\_),  
giving {him|her} \_\_% ownership of the company.  
[[ditto]][ditto]]

Select **Number** to treat the answer typed in the Q&A table as a number.

Select the format **one thousand** to display the number as lowercase words and click **Done**.



This next field shows the number of shares again, but uses numerals instead of words. Rather than create this field from scratch, let's save a little time by copying the previous field and changing its format.

The shareholders are as follows:

{List:{Shareholders#X} owns  
{SharesHeld#X} ( ) shares (current value \$ \_\_),  
giving {him|her} \_\_% ownership of the company.  
[[ditto]][ditto]]

After copying the {**SharesHeld#X**} field and pasting it between the parentheses, your form should look like this.

To format the second {**SharesHeld#X**} field as numerals instead of words, select it, click **Field**, select the format **1,000 (no decimals)**, and click **Done**.

The remaining two fields are more exciting, since they require math.

Select the highlighted blank and click **Field** to open the screen below.

The shareholders are as follows:

{List:{Shareholders#X} owns  
{SharesHeld#X} ({SharesHeld#X}) shares (current  
value \$\_\_\_), giving {him|her} \_\_\_% ownership of the  
company.  
[[ditto]][[ditto]]

The shareholders are as follows:

{List:{Shareholders#X} owns  
{SharesHeld#X} ({SharesHeld#X}) shares (current  
value \$\_\_\_), giving {him|her} \_\_\_% ownership of the  
company.  
[[ditto]][[ditto]]

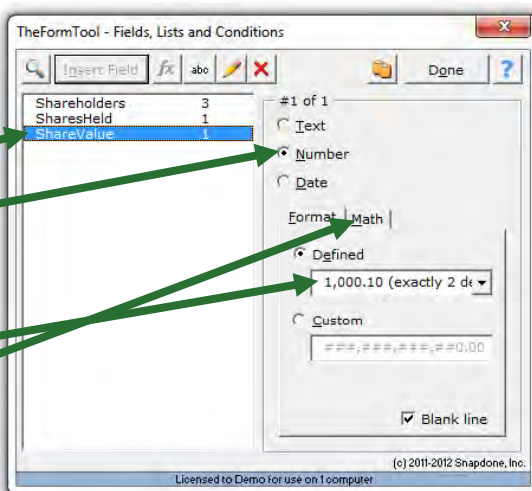
This field will multiply the current share value (ShareValue in the Q&A table) by the number of shares owned by a shareholder (SharesHeld in the Q&A table).

Select **ShareValue** and click **Insert Field**.

Select **Number**.

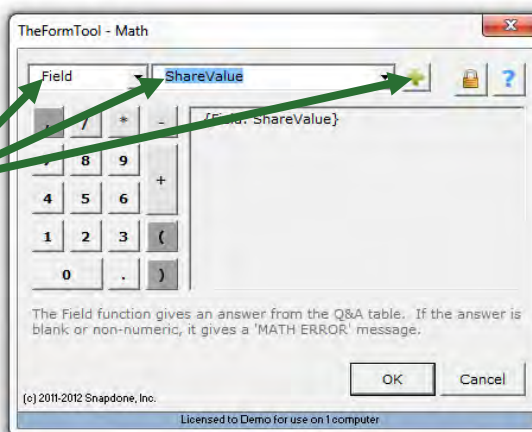
Choose the format **1,000.10 (exactly 2 decimals)**.

Click **Math** to open the Math screen.



First add the ShareValue field to the formula.

Select the **Field: ShareValue** function and click **+** plus to add it to the formula.

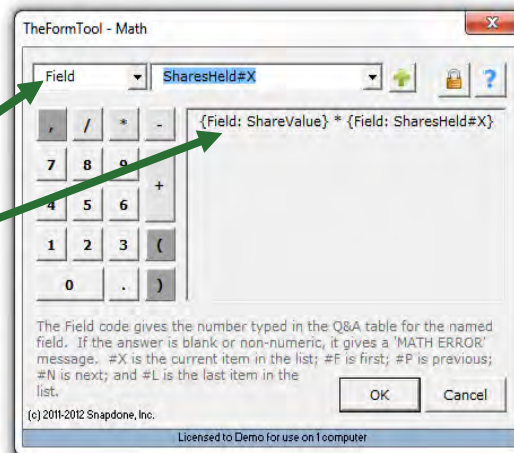


We need to multiply the share value by the number of shares held by the current shareholder. Click the asterisk button (or press the asterisk key on your keyboard) to indicate multiplication.

Select **Field**, **SharesHeld#X**, and click **+** plus to add **{Field: SharesHeld#X}** to the formula.

The finished formula looks like this.

Click **OK** to close the Math screen, then **Done**.



One more field to go! It will calculate the percentage of the company owned by each shareholder.

Select the highlighted blank and click **Field** to open the screen below.

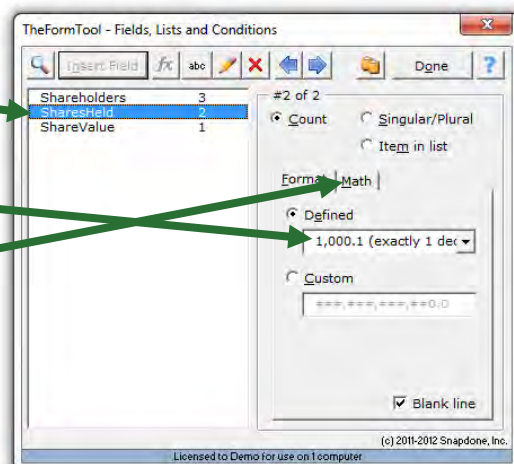
The shareholders are as follows:

{List:{Shareholders#X} owns {SharesHeld#X} ({SharesHeld#X}) shares (current value \${###}), giving {him|her} % ownership of the company.  
[[ditto]][ditto]]

Select **SharesHeld** and click **Insert Field**.

Select the format **1,000.1 (exactly 1 decimal)** so the number will be accurate to the nearest 10th of a percent.

Click **Math** to open the Math screen.

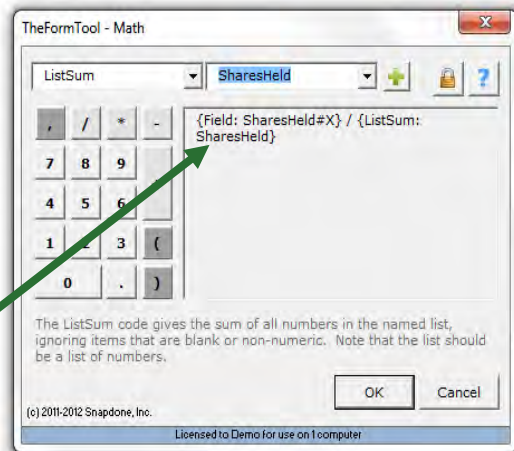


First add a function to the formula that gives the number of shares owned by the current shareholder: select **Field**, **SharesHeld#X**, and click **+** plus.

Click the slash button (or press the forward slash key on your keyboard) to indicate division.

Then add a function that gives the total number of shares listed in the Q&A table's SharesHeld answer: select **ListSum**, **SharesHeld**, and click **+** plus.

Here's what the formula looks like when those steps are complete.



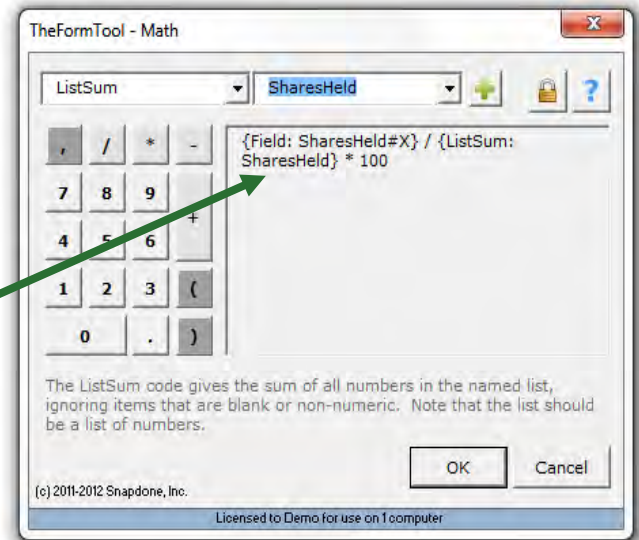


To finish, we'll multiply everything by 100 (since this number is expressed as a percentage in the finished document).

Add **\* 100** at the end of the formula, either by clicking buttons in the Math screen or by typing on your keyboard.

The finished formula looks like this.

Click **OK** to close the Math screen, then **Done**.



If you chose to abbreviate the math fields, the finished form looks like this.

The shareholders are as follows:

{List:{Shareholders#X}} owns {SharesHeld#X} ({SharesHeld#X}) shares (current value \${{Field: ShareValue}}), giving {him|her} {###}% ownership of the company.  
[[ditto]][ditto]]

If you chose not to abbreviate, the finished form looks like this.

The shareholders are as follows:

{List:{Shareholders#X}} owns {SharesHeld#X} ({SharesHeld#X}) shares (current value \${{Field: ShareValue}} \* {{Field: SharesHeld#X}}), giving {him|her} {{Field: SharesHeld#X} / {ListSum: SharesHeld} \* 100}% ownership of the company.  
[[ditto]][ditto]]

## THE PAYOFF

The form user supplies a few names and numbers in the Q&A table, and the form takes care of the rest.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Shareholders	List the shareholders.	Burt Wilmer [he] Frieda Knowles [she] Hugh Soder [he]
SharesHeld	How many shares does each shareholder own?	Burt Wilmer: 180 Frieda Knowles: 235 Hugh Soder: 165
ShareValue	What's the current value of 1 share?	105.35



The shareholders are as follows:

Burt Wilmer owns one hundred eighty (180) shares (current value \$18,963.00), giving him 31.0% ownership of the company.

Frieda Knowles owns two hundred thirty-five (235) shares (current value \$24,757.25), giving her 40.5% ownership of the company.

Hugh Soder owns one hundred sixty-five (165) shares (current value \$17,382.75), giving him 28.4% ownership of the company.

## Example 9: List in Table Format, Master List, and Math

We're really getting into the expert stuff now. Before working through this example, you should be familiar with customized lists (Example 6 on page 65) and Master Lists (page 44).

To automate this form we'll use a list formatted as a table, a Master List of information about classes, and math. If you'd like to work along with this example, begin by typing (or copying) the first and last paragraphs into a blank document.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
Basic Personhood	3/3/2012	125	11.00	136.00
Advanced Humanity	3/17/2012	200	17.60	217.60
TOTAL:				\$353.60

Payment is due one week before the class date.

### Step 1. Create the Master List


Rather than make the form user type a lot of dates and tuition fees, we'll create a Master List of classes that can be maintained and updated in one place, and used by this form and other forms too.

See page 44 for detailed instructions on Master Lists.

Click  **Master List** then  plus to create a new Master List. Name it **ClassInfo** and give it 3 columns.

Add the column headings **Class Name**, **Date**, and **Cost**, and fill in information for three classes as shown here.

Class Name	Date	Cost
Basic Personhood	3/3/2012	125
Intermediate Being	3/12/2012	175
Advanced Humanity	3/17/2012	200

Click  **Master List**, **Save and Close** to save your work.

### Step 2. Create the Q&A Table

TheFormTool (c) 2011-2012 Snapdone,		
Label	Question	Answer
Classes	List the classes registered.	

### Step 3. Create Smart Answer

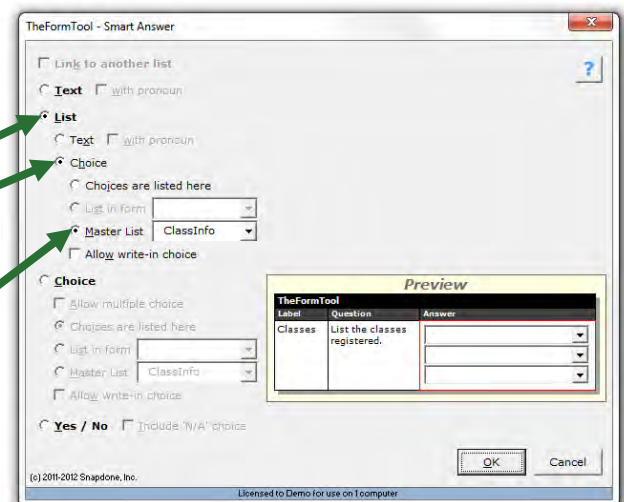
Place the cursor in the answer box and click  **Answer**.

Select **List** (because we're asking the form user for a list of registered classes).

Select **Choice** (because the user will choose each registered class from a list of all classes).

Select **Master List**, **ClassInfo** (because the list of all classes is contained in a Master List named ClassInfo).

Click **OK**.





## Step 4. Add a List

Place the cursor between the two paragraphs where the list is needed (just before the word **Payment**) and click **List, Insert List** to open the screen below.

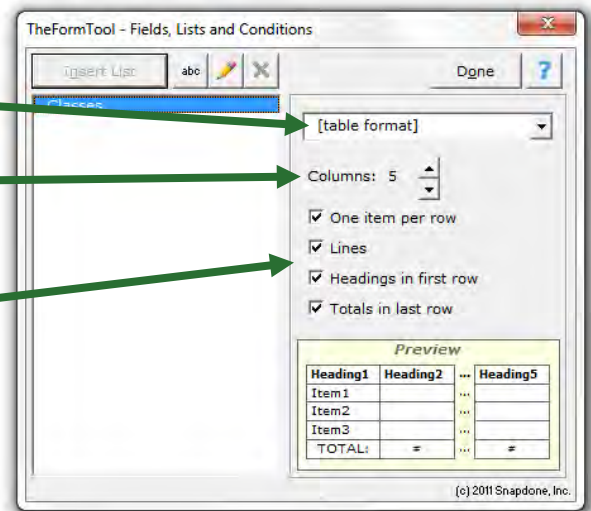
Thank you for registering for the following classes:  
Payment is due one week before the class date.

Select **[table format]**.

Select **5** columns.

Select all of the checkboxes: **One item per row**, **Lines**, **Headings in first row**, and **Totals in last row**.

Click **Done**.



This gives the bare bones of our list, formatted as a table. We'll add some fields and clean it up a bit.

Thank you for registering for the following classes:

Heading1	Heading2	Heading3	Heading4	Heading5
{List:{Classes:Class Name#X}}				
{Classes:Class Name#X}				
{Classes:Class Name#X}				
TOTAL:	0	0	0	0

Payment is due one week before the class date.

## Step 5. Add Fields


The **FormTool** provided placeholders for column headings. Begin by replacing them with the actual headings: **Class**, **Date**, etc. You may want to center the headings too.

Also delete the 0's at the bottom of each column but the last one, since that's the only place we want a total.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}				
{Classes:Class Name#X}				
{Classes:Class Name#X}				
TOTAL:				0

Payment is due one week before the class date.

We'll fill in the Date column next. Place the cursor in the first cell under the Date heading and click  **Field**, **Insert Field** to open the screen below.

Thank you for registering for the following classes:

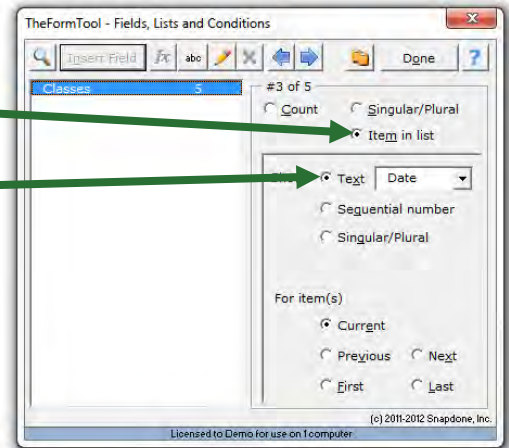
Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}				
{Classes:Class Name#X}				
{Classes:Class Name#X}				
TOTAL:				0

Payment is due one week before the class date.

Select **Item in list**.

Select **Text**, **Date** to use the Date column of the Master List.

Click **Done**.



That's enough to make the date appear for the *first* item in the list, but it needs to appear for *every* item in the list. Rather than create the field from scratch twice more, we'll copy and paste.


Copy the {Classes:Date#X} field.

Paste the copied field into these two cells.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}	{Classes:Date#X}			
{Classes:Class Name#X}				
{Classes:Class Name#X}				
TOTAL:				0

Payment is due one week before the class date.

Use the same method for the Tuition column. Place the cursor in the first cell under the Tuition heading, click  **Field**, **Insert Field**, and select **Item in list**. This time select **Text**, **Cost** to use the Cost column of the Master List and click **Done**.


Copy the {Classes:Cost#X} field from the first Tuition cell and paste it into the other two Tuition cells. Here's the form with the Tuition column completed.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}	{Classes:Date#X}	{Classes:Cost#X}		
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
TOTAL:				0

Payment is due one week before the class date.

Now we'll add math to a field to calculate tax. To figure the tax for a particular class, multiply the Cost by a tax rate.

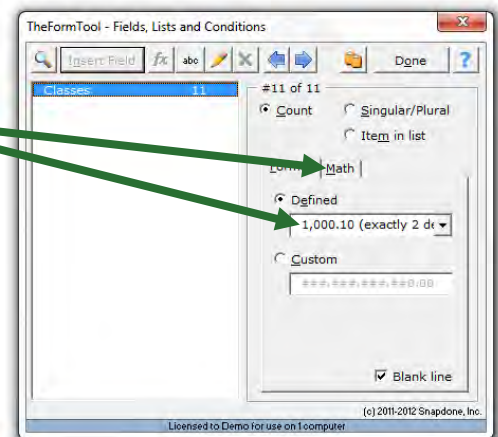
Put the cursor in this cell and click  **Field** to open the screen below.


Thank you for registering for the following classes:

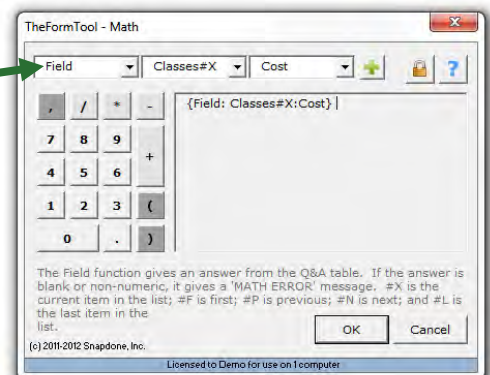
Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}	{Classes:Date#X}	{Classes:Cost#X}		
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
TOTAL:				0

Payment is due one week before the class date.

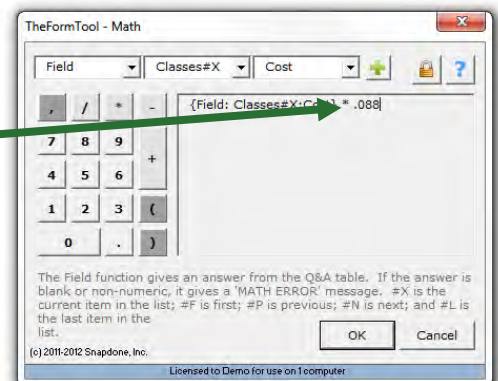
Click **Insert Field** and select the format **1,000.10 (exactly 2 decimals)** and click **Math** to open the Math screen.



Select **Field**, **Classes#X**, **Cost**, and click  plus. This function will provide the cost of the current class. (X designates the current item in a list.)



To multiply the class cost by .088, add **\*.088** to the end of the formula, either by clicking buttons in the Math screen or by typing on your keyboard.



Click **OK** to close the Math screen, then **Done**.

We'll use the same field to calculate tax for other items in the list too.

Copy this field.

And paste it in these two cells.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}	{Classes:Date#X}	{Classes:Cost#X}	{###}	
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
TOTAL:				0

Payment is due one week before the class date.

The last column will calculate tuition plus tax. We can copy one of the existing Tax fields as a starting point, then use math to add Tuition.


Copy this field.

And paste it here.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}	{Classes:Date#X}	{Classes:Cost#X}	{###}	
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	
TOTAL:				0

Payment is due one week before the class date.

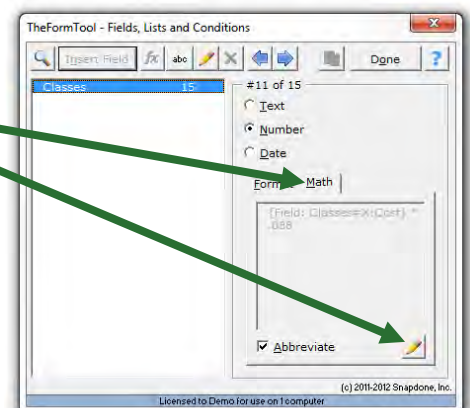
Select the field you pasted in the Total column and click  **Field** to open the screen below.

Thank you for registering for the following classes:

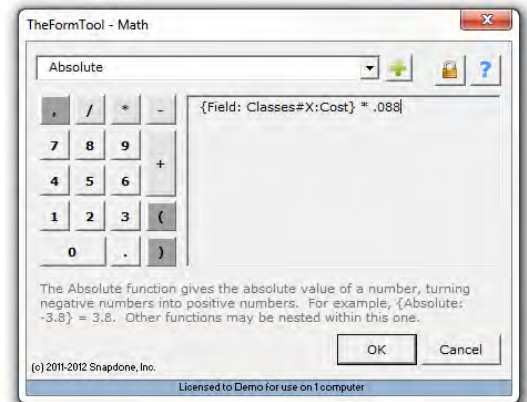
Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	
TOTAL:				0

Payment is due one week before the class date.

Click **Math** then the  pencil to open the Math screen.

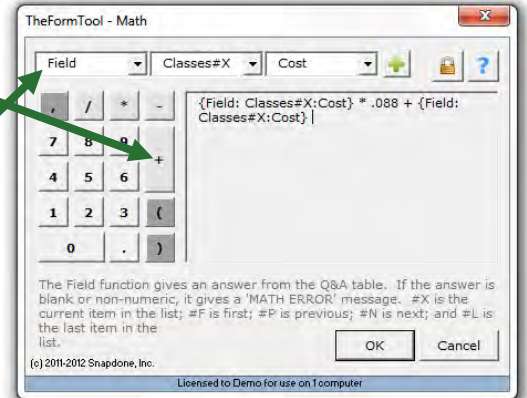


The formula already calculates tax. We'll add the tuition amount to get a total.



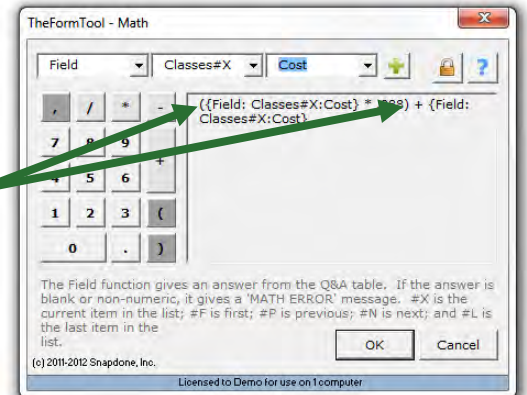
Click the **+** button for addition (or type it on your keyboard).

Select **Field**, **Classes#X**, **Cost**, and click **+** plus. This function gives the cost of the current class in the list.



Whenever there is a chance that a formula may be calculated in the wrong order, use parentheses to indicate priority.

In this example, the result would be incorrect if addition were performed before multiplication. So add parentheses as shown here to make sure the multiplication is performed first.



Click **OK** to close the Math screen, then **Done**.

As before, copy and paste the field you created to fill out the Total column.

Copy this field.

And paste it in these two cells.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}	{Classes:Date#Y}	{Classes:Cost#X}	{###}	{###}
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	
{Classes:Class Name#X}	{Classes:Date#Y}	{Classes:Cost#X}	{###}	
TOTAL:				0

Payment is due one week before the class date.

One more item requires attention. The **0** in the last cell is a “sum” field. It’s a standard Word field, so it needs to be formatted with the standard Word menu.

You can either replace it with a **TheFormTool** field that calculates total tax plus total tuition, or use the standard Word method: right-click on the field, choose **Edit field**, click **Formula**, and choose the number format **\$#,##0.00**.

Finish up with any additional formatting you prefer. In the example shown here, the dates and dollar amounts are all centered.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
TOTAL:				0

Payment is due one week before the class date.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
TOTAL:				\$ 0.00

Payment is due one week before the class date.

## THE PAYOFF

The form user makes a couple quick choices from a multiple-choice list, and additional information is drawn from the ClassInfo Master List and included in the resulting document, along with several math calculations.

TheFormTool (c) 2011-2012		
Label	Question	Answer
Classes	List the classes registered.	Basic Personhood Advanced Humanity



Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
Basic Personhood	3/3/2012	125	11.00	136.00
Advanced Humanity	3/17/2012	200	17.60	217.60
TOTAL:				\$353.60

Payment is due one week before the class date.



## Example 10: Derived Answers

### Example 10a: Basic Derived Answer

Derived Answers can be used to “leverage” information that’s been provided in another answer. Here we’ll use a birthdate to automatically determine a person’s age without asking an additional question. This example uses a Math function, so you might want to read through Example 7 first (page 77).

If you’d like to work along with this example, begin by typing (or copying) this text into a blank document. We’ll be adding a condition to include the “minor” language only when appropriate.


The beneficiary is Larry Reno, a minor (born May 13, 2001).

#### Step 1. Create the Q&A Table

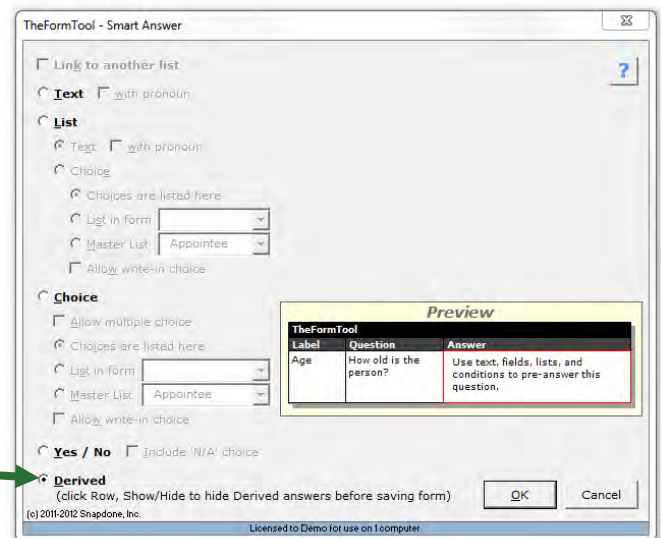
TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Name	What’s the beneficiary’s name?	
DOB	What’s the beneficiary’s birthdate?	
Age	How old is the beneficiary?	

#### Step 2. Create a Derived Answer

Rather than make the form user answer the Age question, we’ll create a Derived Answer to answer it automatically.

Place the cursor in the answer box for the Age question and click  **Answer** to open the Smart Answer screen.

Select Derived and click **OK**.

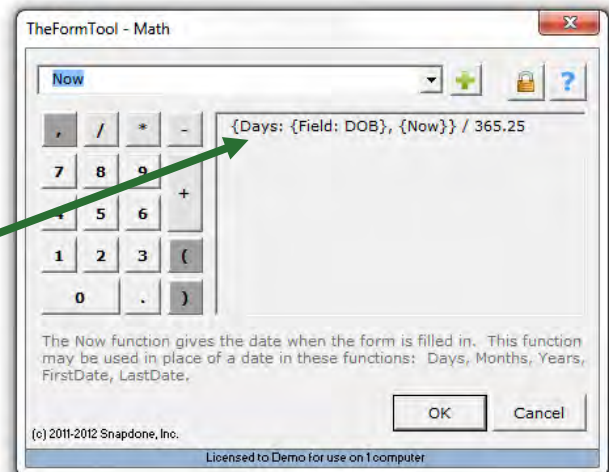


Now that this is a Derived Answer, you can fill the answer box with any combination of text, fields, lists, and conditions. In this example, all we need is a single math field, but other Derived Answers may be far more complex.

Make sure the cursor is still in the answer box for the Age question and click **Field**, **fx** to open the Math screen.

Create the math formula shown here (see Example 7 on page 77 for help if this is your first math formula). It uses the Days function to determine the number of days between the birthdate and today, then divides that number by 365.4 to come up with the person's age. (The birthdate and "today" are obtained with two other functions: **{Field: DOB}** and **{Now}**.)

Click **OK** to close the Math screen, then **Done**.



### Step 3. Add Fields

Select **Larry Reno** and replace it with a field: click **Field**, select **Name**, and click **Insert Field**, **Done**. The result looks like this.

The beneficiary is **{Name}**, a minor (born May 13, 2001).

Select **May 13, 2001** and replace it with a field: click **Field**, select **DOB**, and click **Insert Field**. Choose **Date** format and click **Done**. The result looks like this.

The beneficiary is **{Name}**, a minor (born **{DOB}**).

### Step 4. Add a Condition

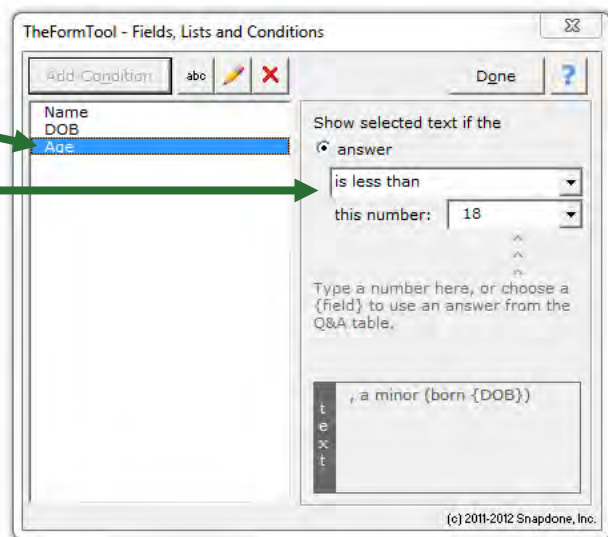
The "minor" language should appear only when Age is less than 18, so we'll add a condition.

Select the highlighted text and click **Condition**.

The beneficiary is **{Name}**, a minor (born **{DOB}**).





Select **Age** and click **Add Condition**.

Select **is less than**, type the number **18**, and click **Done**.



The finished form looks like this.

The beneficiary is {Name}{Age<18}, a minor (born {DOB}).

One step remains. Click  **Row**,  **Show/Hide** to hide your Derived Answer – since it is automatically answered, it would only be a confusing distraction to the form user. If you need to edit it later, click  **Row**,  **Show/Hide** again to make it visible.

## THE PAYOFF

Note that the Age answer is not visible in the Q&A table below. The form user just enters a birthdate – the age is calculated automatically in the background, and the sentence is altered accordingly.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Name	What's the beneficiary's name?	Mercedes Winthrop
DOB	What's the beneficiary's birthdate?	8/25/62



The beneficiary is Mercedes Winthrop.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Name	What's the beneficiary's name?	Grant Baker
DOB	What's the beneficiary's birthdate?	10/3/2002



The beneficiary is Grant Baker, a minor (born October 3, 2002).

### Example 10b: Linked Derived Answer, Field Comparison

But what if you have a whole list of people, and you need to derive the age of each one of them? And what if the age of majority is flexible, provided by the form user? Make sure you're familiar with linked lists (Example 8 on page 82) before trying this example.

This example is similar to Example 10a above, with a couple adjustments to handles a whole list of people and a flexible cut-off date to determine adulthood.


The beneficiaries are listed below:  
Larry Reno  
Annette Garland, a minor (born May 13, 2001)  
Phil Bertrand

#### Step 1. Create the Q&A Table

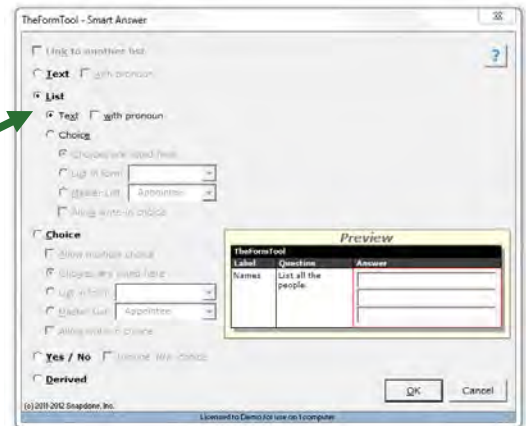
TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Names	List all the beneficiaries.	
DOBs	What's each beneficiary's birthdate?	
Ages	How old is each beneficiary?	
AdultAge	What's the age of majority?	18

## Step 2. Create Smart Answers

The Names question will have a List-type answer containing a series of text items.

Place the cursor in the Names answer box and click  **Answer**.

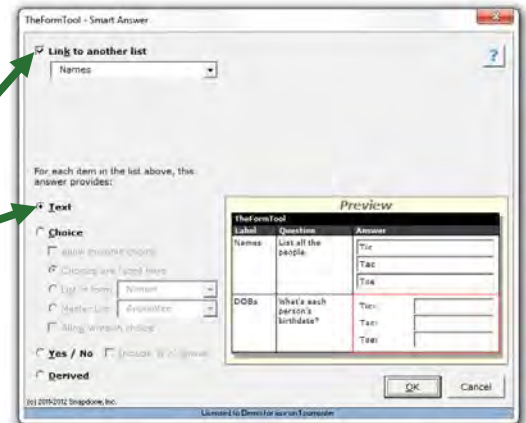
Select **List**, **Text**, and click **OK**.



The DOBs question will have a Linked List answer containing a series of text items.

Place the cursor in the DOBs answer box and click  **Answer**.

Select **Link to another list** and choose the **Names** list.

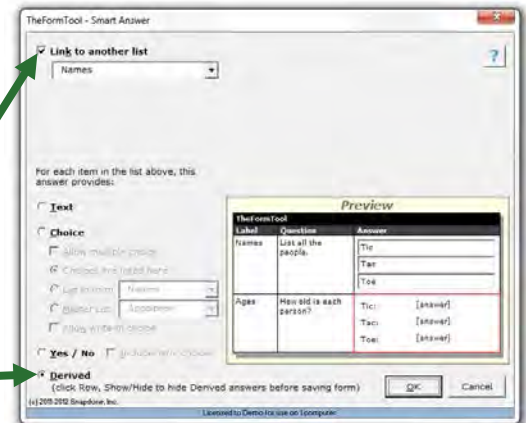


Select **Text** and click **OK**.

And the Ages question needs a Linked Derived Answer.

Place the cursor in the Ages answer box and click  **Answer**.

Select **Link to another list** and choose the **Names** list.



Select **Derived** and click **OK**.

A whole list structure has been created in the answer box, and **[answer]** is preselected.

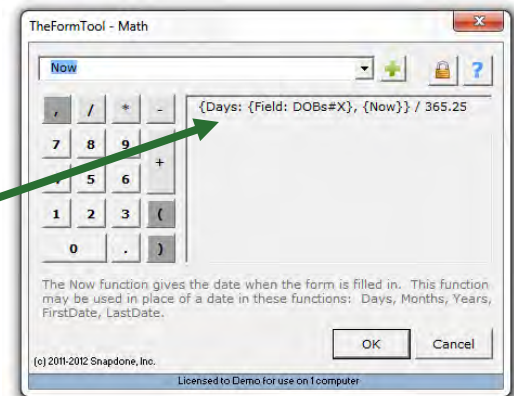
TheFormTool (c) 2012 Snapdone, Inc.		
Label	Question	Answer
Names	List all the beneficiaries.	[??]
DOBs	What's each beneficiary's birthdate?	[?]-[?]-[?]
Ages	How old is each beneficiary?	{List:^[Names#X]: [answer]  [ditto]  [ditto]}
AdultAge	What's the age of majority?	18

Now we'll replace **[answer]** with whatever text, fields, lists, and conditions are needed to create our derived answer. In this case, we need a math field that calculates age.

With **[answer]** selected, click **Field**, *fx* to open the Math screen.

Create the same age formula we used in the previous example (page 97), with one change: instead of using **{Field: DOB}**, use **{Field: DOBs#X}**. This is an Item-in-List field, providing the birthdate of the current person in the list.

Click **OK** to close the Math screen, then **Done**.



### Step 3. Add a Custom List

We'll create the list of names with a custom list. (See Example 6 on page 70 if you have not worked with custom lists before.)

Select the highlighted text and click **List**, select **Names**, click **Insert List**, select **[repeating paragraphs]**, and click **Done**.

This provides the framework of our list – a paragraph that will be repeated for each item in the list of names.

Modify the sample paragraph so that it looks like this, including the “minor” language – in a moment we'll make it conditional depending on each person's age.

Now replace the blank with a field to show the birthdate of the current person in the list:

Click **Field** to open the screen below.

The beneficiaries are listed below:

Larry Reno

Annette Garland, a minor (born May 13, 2001)

Phil Bertrand

The beneficiaries are listed below:

{List:Sample paragraph about {Names#X}.

[[ditto]][ditto]]

The beneficiaries are listed below:

{List:{Names#X}, a minor (born \_\_\_\_)

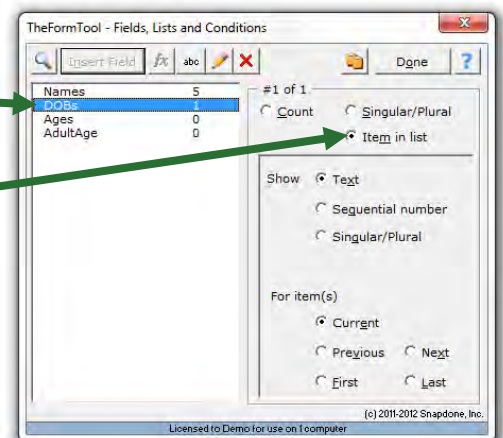
[[ditto]][ditto]]

{List:{Names#X}, a minor (born \_\_\_\_)

[[ditto]][ditto]]

Select **DOBs** and click **Insert Field**.

Select **Item in list** and click **Done**.





Finally, we'll make the "minor" language conditional for each person in the list (similar to what we did on page 97 in the previous example).

Select the highlighted text and click **Condition** to open the screen below.

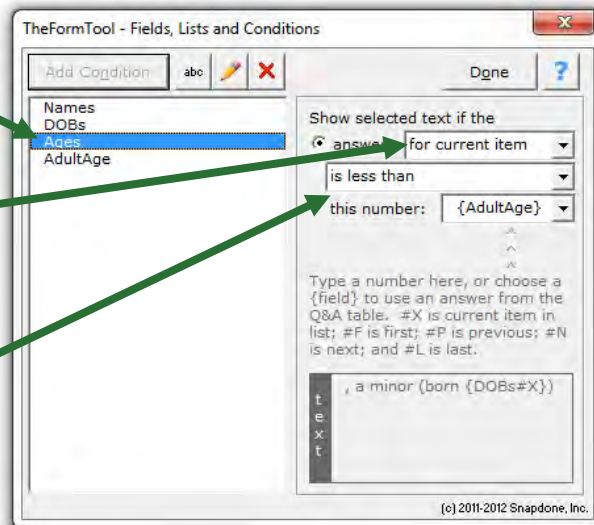
```
{List:{Names#X}, a minor (born {DOBs#X})  
[[ditto]][ditto]]
```

Select **Ages** and click **Add Condition**.

Select **for current item**, because we want to check the age of the current person in the list.

Select **is less than** and **{AdultAge}**. Rather than type a fixed number 18, we're using the age of majority provided by the form user in response to the AdultAge question in the Q&A table.

Click **Done**.



The finished form looks like this.

The beneficiaries are:

```
{List:{Names#X}{Ages#X<{AdultAge}}, a minor  
(born {DOB#X})  
[[ditto]][ditto]]
```

Don't forget the final step. Click **Row**, **Show/Hide** to hide the Ages answer from the form user. Since it's a Derived Answer processed automatically in the background, there's no reason to distract them with it.

## BA-DA-BING

The age of each person is calculated automatically, and that age is compared with an age of majority provided by the form user.

TheFormTool (c) 2011-2012 Snapdone, Inc.		
Label	Question	Answer
Names	List all the beneficiaries.	Mercedes Winthrop Gavin Lloyd Paula Stimpson
DOBs	What's each beneficiary's birthdate?	Mercedes Winthrop: 5/16/58 Gavin Lloyd: 4/9/99 Paula Stimpson: 8/25/62
AdultAge	What's the age of majority?	21



The beneficiaries are:

```
Mercedes Winthrop  
Gavin Lloyd, a minor (born April 9, 1999)  
Paula Stimpson
```



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

Here are some helpful online resources at [www.theformtool.com](http://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	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	You're reading it now! 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](http://www.forum.theformtool.com).

Please feel free to contact us at [support@theformtool.com](mailto:support@theformtool.com).

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