TheFormTool

Instructions for using TheFormTool at SC Bar YLD Habitat Clinic

Here are steps we recommend to get the most from intelligent documents™ created with TheFormTool for use at the SC Bar YLD Habitat clinics. Spend 10 minutes now to save yourself time, stress and errors while making the clinic an enjoyable experience for you and for those you serve!

Installation

1. Download a version of TheFormTool created especially for you from http://www.theformtool.com/scbarclinic. The package will include TheFormTool program, instructions and the forms prepared especially for your use at the clinic.
2. Open the zip file. Read read the "Read Me" file.
3. Open the file named theformtool.docm. Follow the 4-6 steps necessary to install TheFormTool. Note that TheFormTool requires Word 2007 or later running on a Windows platform.
4. Open a blank Word document. Verify that TheFormTool has been added as a Word menu item. Click on it. Click on Table. TheFormTool will request your license information. Type in the Registration Name and License Code you received from SC Bar YLD. With that, TheFormTool is fully activated on your machine.
5. Splurge. Take a few minutes to read your choice of *The Cheat Sheet*, the *Quick Study Guide*, or even the *Expert User Manual*. For a change of pace, watch one or two of the demo videos on TheFormTool's website. They're quite impressive.

The Intelligent Document™ for the Habitat Clinic

1. Safeguard the Word template named *SC Bar Habitat Clinic.dotm* that we've included in the downloaded folder. Put it in a safe location and immediately *make a copy and save the copy as a Word template (a .docm or .dotm) for your actual use*.
2. Make certain that the version you're going to use is a Word template. This will prevent over-writing the document and allow you to reuse it over and over.

The Clinic

1. You'll be using just three of TheFormTool's commands to create up to seven completely personalized documents for your clinic clients.
2. With the *SC Bar Habitat Clinic.dotm* template open and TheFormTool selected on Word's menu bar, click Start (that's 1 command), which will take you to the top of TFT's Question & Answer Table at the bottom of the document.
3. Use the Tab command to move through the Questions, answering all the questions that are appropriate to the Client's choices. You'll see that entire sections may or may not be necessary to answer. You may also want to reserve questions, such as the names of the Witnesses, until the interview is completed, or even omit them entirely.
4. As you go through the interview, consider saving the document frequently, just in case.
5. After you complete the interview, proof or edit the Answers. When the Answers are correct, the document will be correct, so this is your easy path for zero errors.
6. When you're satisfied, save the document, then click Fill (that's two). TheFormTool will select and personalize the documents for the client.
7. If you're all done, the final step with TheFormTool is to click Petrify (that's #3). This will remove all of TheFormTool metadata and present you with a clean Word document suitable for presentation to the client for initialing and signatures. DO NOT save the petrified document. Doing so would overwrite the archival version which you'll want to have should any changes be necessary.