Quick-Start Guide

Version 2.5

Forms don't need to be dumb as bricks.

You can teach them, they'll learn.

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

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

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

Imagine that.

Forms without mistakes.

We call them brilliant.

You will, too.

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One-Page Cheat Sheet

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

1. Install TheFormTool

Double-click the .zip file you downloaded to see the files it contains. Double-click the .docm file (**TheFormTool.docm** or **TheFormToolPRO.docm**) to install the program.

2. Activate it

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

▶ Skip Steps 3 and 4 and watch our 3-minute video instead: www.theformtool.com/starter-video-demo

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 (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.

▶ **TheFormTool** (c) 2011-2013 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. Then save and close the finished form.

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

Signed:

_____

{SIGNER}

4. Use your new smart form to create a document

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

5. For later

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

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Meet the Buttons

TheFormTool Free Version

TheFormTool PRO

Installing TheFormTool

Step 1: Open the Installation File

TheFormTool (Free Version)

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

Double-click that file to install TheFormTool.

TheFormTool PRO

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

Double-click that file to install TheFormTool PRO.

If file extensions are visible on your computer, you will see a **.docm** at the end of the filename: **TheFormTool.docm** or **TheFormToolPRO.docm**.

Step 2: Security Warnings?

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.

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

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 TheFormTool commands.

If TheFormTool tab does not appear, try restarting your computer. If that doesn't work, please contact us so we can help you get started (support@theformtool.com).

Step 4: Enter License Code (only required for TheFormTool PRO)

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.theformtool.com/theformtoolpro. If you've lost your license code, please contact us (support@theformtool.com).

Step 5: Sharing Information on a Network (Requires TheFormTool PRO)

TheFormTool initially saves program information (saved answers, saved Q&A 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.

Step 6: Updates

Check www.theformtool.com/updates periodically for updates to TheFormTool. To be notified when updates are available, subscribe to our newsletter at www.theformtool.com/newsletter.

Creating a Form

We'll turn this document into a form.

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

Signed: _____
ABIGAIL BENTLEY

Step 1: The Q&A Table

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

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

Signed: _____
ABIGAIL BENTLEY

TheFormTool (c) 2011-2013 Snapdone, Inc.		
Label	Question	Answer

In this example, we need to ask the form user for the signer's name and birthdate.

Type the two questions in the Q&A Table, including a short label for each.

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

Signed: _____
ABIGAIL BENTLEY

TheFormTool (c) 2011-2013 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

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

The**Form**Tool **PRO** only: Later on, the Q&A table is "locked" so form users can't accidentally alter it. But you can still add rows by clicking **Row/Col**, **Add**.

Step 2: Add Fields

Select "Abigail Bentley" and click **Field** to open the screen shown below.

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

Signed: _____
ABIGAIL BENTLEY

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Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

The questions in the Q&A Table are listed here. In this example, there are only two: **Signer** and **DOB**. Select **Signer** and click **Insert Field**.

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

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

We'll add two more Fields.

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

Signed: _____
ABIGAIL BENTLEY

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Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Select "April 17, 1960" and click **Field** to add the second Field.

Use the same steps as above, but this time choose the **DOB** label and **Date** format.

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

Signed: _____
ABIGAIL BENTLEY

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Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Now select "ABIGAIL BENTLEY" and click **Field** to add the last Field.

For this Field choose the **Signer** label and **UPPERCASE** format.

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

Signed: _____
ABIGAIL BENTLEY

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Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

The finished form looks like this.

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

Signed: _____
{SIGNER}

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Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Using a Form

Step 1: Type Answers

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

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

Signed: _____
{SIGNER}

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

Click **Start** to quickly move your cursor to the Q&A Table, poised to answer the first question.

Step 2: Fill in the Form

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

Done!

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

Signed: _____
HORACE BLIXT

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

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

Old File Formats – Pre-2007 Files 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 these steps:

Word 2007	Word 2010 and Word 2013
Click the **Office** button (the round button in the top left corner), then click **Save As**. In the **Save as type** box, choose **Word Document (.docx)** or **Word Template (.dotx)**. Near the bottom of the screen, make sure the **Maintain compatibility with Word 97-2003** checkbox is **UNCHECKED**. Click **Save**.	Click **File**, **Save As**. In the **Save as type** box, choose **Word Document (.docx)** or **Word Template (.dotx)**. Near the bottom of the screen, make sure the **Maintain compatibility with previous versions of Word** checkbox is **UNCHECKED**. Click **Save**. If you *still* see **[Compatibility Mode]** at the top of the screen, click **File**, **Info**, **Convert**.

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 brand new document elsewhere.

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.

As the form author, you 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.

Smart Answers

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

Text-With-Pronoun Answers

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

The Preview area shows what the answer will look like.

Series Answers

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

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

See The Expert User Guide for examples of Series answers that present a Dropdown box for each item in the list.

Choice Answers

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

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

Click plus to add a choice, ✕ to remove a choice, the pencil to edit a choice, and the arrows to rearrange choices.

See The Expert User Guide for examples of the other sources for Choice answers: **Answer** and **Master List**.

Yes/No Answers

Select **Yes/No** when asking for a yes-or-no response. The **Include 'N/A' choice** checkbox determines whether "not applicable" is included as a third response.

Derived Answers

Derived Answers are automatically derived from other answers, requiring no additional input. For example, if another 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 are hidden from form users before saving the form by clicking **Row/Col**, **Show/Hide**.

Derived answers are extremely flexible and range from very simple to very complex, since they can contain any combination of text, Fields, Lists, and Conditions. See the Expert User Guide for suggestions and examples.

Linked Answers

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

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

Grid Answers

Grids are a special type of answer that appear under the Q&A Table and supplement it.

Q&A Table

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Label	**Question**	**Answer**
DateSign	Date of signing?	12/29/2012

Grid

List all the parties:

Name	Street	City	State	ZIP
Terry Porter	555 Main Street	Seattle	Washington	98101
Garth Blinth	123 Sycamore Lane	Chicago	Illinois	50103
Eva Roette	868 Meridian Drive	Houston	Texas	76023

To add a Grid, place the cursor *below* the Q&A Table, click **Answer**, and enter the number of columns desired.

Grids can contain Smart Answers. When you apply a Smart Answer in a Grid, you are choosing a Smart Answer for an *entire column*. To add a Smart Answer, place the cursor anywhere in the desired column and click **Answer**.

Field Types

We already glimpsed Text, Date, and Number Fields in the first example on page 4. The following Field types add even more intelligence to your forms.

Pronoun Fields

Pronoun Fields automatically choose words like "he/she" and "him/her" depending on which pronoun is selected in a Pronoun answer. They also automate gender words like "husband/wife", "son/daughter", and "testator/testatrix".

Singular/Plural Fields

Singular/Plural Fields automatically choose words like "is/are" and "child/children" depending on (1) which pronoun is selected in a Pronoun answer; or (2) how many items appear in a Series, Choice, or Grid answer.

Count Fields

Count Fields refer to the number of items in a Series, Choice, or Grid answer. They can be formatted as numbers or words.

Conditions

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

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

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

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

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

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

Replace the names in the document with Fields.

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

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

See page 5 if you need a refresher course on inserting fields.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

The finished form looks like this. The first conditional sentence will be used when the Spouse answer **is not empty**; and the second conditional sentence will be used with the Spouse answer **is empty**.

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

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

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

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

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

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

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

My name is Betty Miller. I am not married.

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

Lists

Lists are like Fields, except they are used with Series, Choice, and Grid answers to add a whole series of items to a form.

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

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

Lists are another extremely flexible feature. See the Expert User Guide for examples of all sorts of built-in List formats, and to learn how to create your own custom Lists.

Capturing and Reusing Data (Requires TheFormTool PRO)

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

Saving Answers

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

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

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

Click **GO** to finish.

Loading Answers

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

Click **Save/Load** and select the **Smith v. Jones** answer file.

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

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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:

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

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

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

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

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