



## Getting Started with Florida Forms

**TOO BUSY TO READ?** If you prefer a video, skip this whole guide and watch this 5-minute video instead: [This Changes Everything](#).

TheFormTool PRO adds real intelligence to your repetitive documents to eliminate errors, improve productivity, enhance quality, and reduce stress. It's document automation for the rest of us.

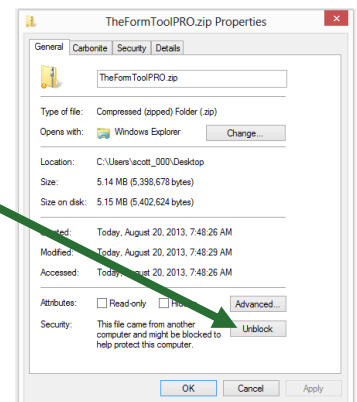
This guide walks you through installation of your 30-day free evaluation copy of TheFormTool PRO in Step 1. Step 2 introduces a sampler pack of automated forms adapted from The Florida Bar PRI's Administrative Forms Handbook. And in Step 3 you'll brand those forms with your own office's look and feel.

Because TheFormTool PRO forms are created and used entirely within Word, you can modify them just like any other Word document -- switch 'em up, swap 'em out, revise and rework them to fit your own particular needs and preferences.

### Step 1: Install TheFormToolPRO

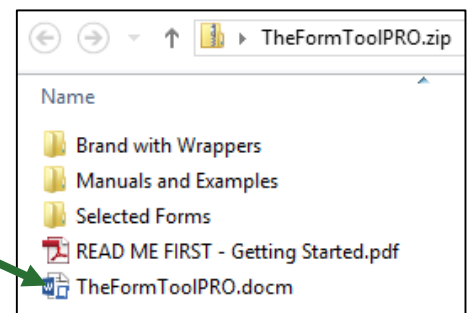
Right-click the file you downloaded (**TheFormToolPRO.zip**) and choose **Properties**. If you see an **Unblock** button, click it to unblock the file, then click **Apply**.

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



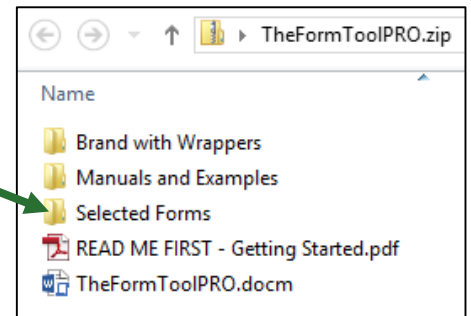
Double-click the same file to open it and see the files it contains.


Double-click the file named **TheFormToolPRO.docm** to install the program.

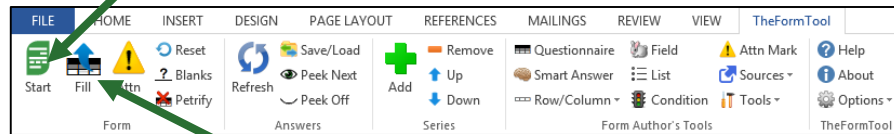


## Step 2: Try Out Your Free Forms

To get you started, we've intelligently automated several forms based on The Florida Bar PRI's Administrative Forms Handbook. You can try one out right now -- just open the **Selected Forms** folder, choose a form, and double-click it to create a new document.




On **TheFormTool** tab, click  **Start** to move the cursor to the first answer box in the questionnaire at the bottom of the form.




Answer all the questions (if you're a mouse person, click to move from one answer box to the next; if you're more of a keyboardist, press **Tab**).

When you're done, click  **Fill** on **TheFormTool** tab.

**TheFormTool** instantly processes your answers, fills-in and formats fields, makes intelligent decisions about conditional language, and finally (if you've done Step 3 below), applies your own firm's branding to the finished product.

Either save the finished document as-is to allow for future automated changes, or click the  **Petrify** button to create a clean copy for emailing to a client or filing with the court.

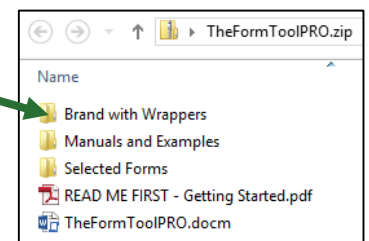
**TIP:** The  **Save/Load** command lets you save answers from one form and use them later in another form for the same matter, eliminating repetitive typing, typos, and proofreading time.

Feel free to copy these forms and the resulting documents onto your computer wherever you like to store them -- they're yours to keep, copy, and customize.

## Step 3: Brand Your Forms with Wrappers

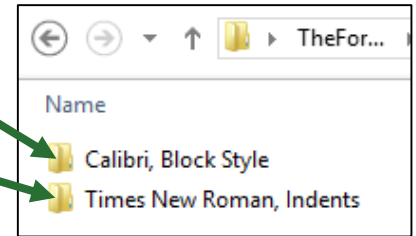
These forms work right out of the box, but if you decide to use them regularly, you'll want to brand them with your own "look." This is done with the built-in "Wrappers" feature. You can customize a Wrapper with your own preferred fonts, styles, margins, letterhead, logo, headers, and footers. Your Wrapper is then automatically and instantly applied each time you use a form, giving all your finished documents a consistent personalized appearance.

Double-click the file you downloaded (**TheFormToolPRO.zip**) to see its contents, then double-click the **Brand With Wrappers** folder to open it.



We provided two basic “looks” to get you started. If you prefer sans-serif block text, open the **Calibri, Block Style** folder.

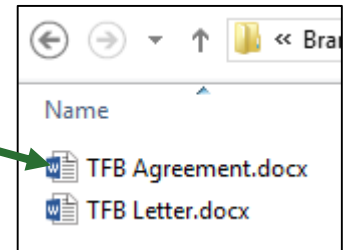
Or if a serif font with indented paragraphs is more your thing, open the **Times New Roman, Indents** folder.



## A Wrapper for Agreements

Double-click the **TFB Agreement** file to open it.

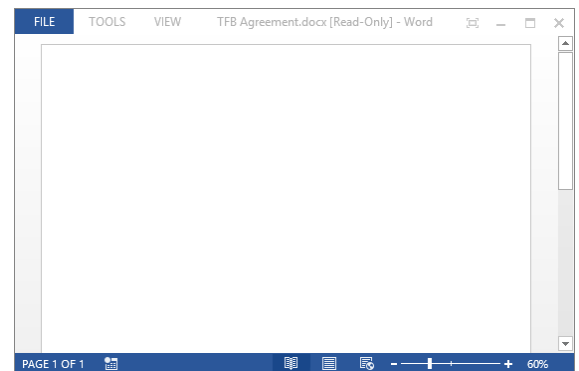
It looks like a blank document, but it contains margin settings, font settings, styles, and page numbers that will be applied to your agreement forms.



If it opens in a minimalist read-only view like the one shown here, click **View, Edit Document**.

Make any global formatting changes you like (maybe you prefer the page number to be flush-right instead of centered, or you prefer wider margins...).

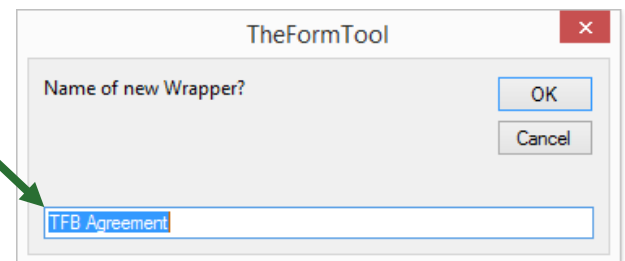
If you made changes, click **File, Save**, and save the modified file anywhere you like.



On **TheFormTool** ribbon, click  **Sources**,  **Wrappers**, **Create new Wrapper with current document**.

**IMPORTANT:** Don’t change the default Wrapper name we’ve provided. Just click **OK** to save the Wrapper.

Good work! All of the agreements in your form pack will now automatically conform to the format and styles specified in that Wrapper.

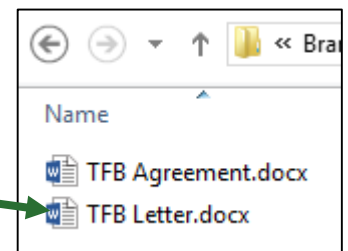


## A Wrapper for Letters

Go back to the folder where you found the **TFB Agreement** file above (in either the **Times New Roman, Indents** folder or the **Calibri, Block Style** folder).


Double-click the **TFB Letter** file to open it.

If it opens in a minimalist read-only view, click **View, Edit Document**.



Make any necessary changes in the header and footer. You’ll need to type your own firm name and address. Maybe you’ll add a logo too. In fact, it might be easiest to copy the whole letterhead from one of your existing letters and paste it into the header here.

Once the header and footer look just right, save the modified file anywhere you like (temporarily saving it on your desktop is fine).

Click  **Sources**,  **Wrappers**, **Create new Wrapper with current document**.

**IMPORTANT:** Don't change the default Wrapper name (**TFB Letter**). Just click **OK** to save the Wrapper.

Congratulations! All of the letters in your form pack will now be branded with your own letterhead automatically.

## We're Here

Want to automate your own forms? It's way easier than you think. Want to customize your Wrappers even further? Want to turn your law practice into an awesome, streamlined engine of productivity? Try these helpful resources at [www.theformtool.com](http://www.theformtool.com):

The Learning Curve	Join us any (or every!) Wednesday at 8am PT / 11am ET for our live, customer-oriented webinar. Ask a question or just tune in to get some tips and see what others are saying. Stay for a minute or an hour: <a href="#">The Learning Curve</a> .
Quick Start Guide	For those who prefer a quick written tutorial. Find it in the <b>Manuals and Examples</b> folder within the file you downloaded, or online <a href="#">here</a> .
Expert Guide	For technophiles who want to know absolutely <i>everything</i> . Find it in the <b>Manuals and Examples</b> folder within the file you downloaded, or online <a href="#">here</a> .
More about Wrappers	To delve deeper into Wrapper customization options, read the <b>Wrappers</b> guide, found in the <b>Manuals and Examples</b> folder within the file you downloaded.
Service Center	Problems? We can help you sort them out at <a href="http://service.theformtool.com">service.theformtool.com</a> .
Videos	Go from basics to rocket science with The Learning Curve videos <a href="#">here</a> .
Troubleshooting	Find a short list of troubleshooting steps to cure common problems <a href="#">here</a> .

If you haven't done so already, sign up for our newsletter so you can stay informed of updates and improvements: [newsletter](#).

### Want a lifetime license for TheFormTool PRO?

It's not only the *easiest to use and most powerful document assembly software in the world*, but it's also the least expensive, and is backed by our 100% satisfaction guarantee.

Act now and use discount code FL921MA to save 10% off the \$89 price as a member of The Florida Bar: [www.theformtool.com](http://www.theformtool.com).