One-Page Cheat Sheet

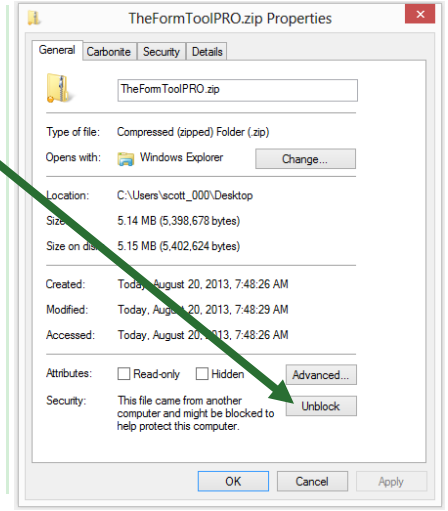
For those who are driven to get started *right now,* without filler or fluff

1. Install TheFormTool

Right-click the file you downloaded (either **TheFormTool.zip** or **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 .zip file 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: 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.

Add a Questionnaire at the bottom of the form by clicking **Questionnaire** on TheFormTool tab. Type questions in the Question column and a short label for each question in the Label column.

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.

4. Use your new smart form to create a document

Open the form you created in Step 3. Type answers in the Questionnaire 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.

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.

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

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

Signed:

_____

{SIGNER}