Converting Templates from HotDocs[©] to TheFormTool[®] Products

By Bill Cutchin

DocAssembly Guru, Expert Form Author and Consultant
www.DocAssembly.Guru
850,980,4365

While there is no direct conversion method for translating a HotDocs ("HD") template into a template for TheFormTool PRO, Doxserá, Doxserá DB, or Aurora webData ("**TheFormTool**"), I have found these steps to be a simple and useful way to handle the conversion:

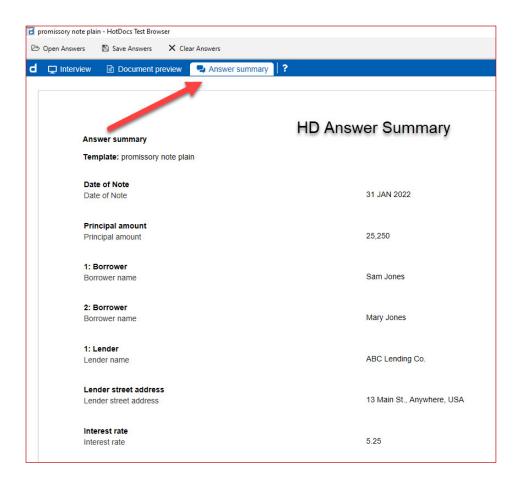
1. Open the HD template.

Principal Amount: \$[Principal amount:9,999.00]

FOR VALUE RECEIVED, the undersigned, [REPEAT Borrower:a, b, and c][Borrower name:Like This][END REPEAT] (the "Borrower"), hereby acknowledges itself indebted to [REPEAT Lender:a, b, and c][Lender name] [END REPEAT](the "Lender") and promises to pay to the Lender at [Lender street address] the principal sum of [Principal amount:Nine Dollars and Twelve Cents] Dollars (\$[Principal amount:9,999.00]) with interest at the annual rate of [Interest rate:9,999.00]%, calculated monthly, until paid.

- 2. Save the HD template as either a .DOTX or .DOCX file in the folder in which you are going to put **TheFormTool** templates.
 - a. You will use this file later as the basis of your **TheFormTool** template.
- 3. On the HD template screen, open the Field Appearance dialog Field Appearance (click on Field Appearance in the upper left of the HD Author screen). Placeholder Fields Abbreviate placeholders (show only placeholder types) 4. Be sure: ✓ Show placeholder types in addition to names/expressions ✓ Show formats a. Abbreviate Placeholders box is NOT checked. Instruction Fields Abbreviate instruction fields b. Show placeholder types in addition to names/expressions ✓ Show list formats on REPEATs is checked. All Fields **✓** Comments c. Show Formats box is checked. Field Delimiters Left: [Right:] ✓ Update fields

- d. Abbreviate instruction fields box is NOT checked.
- e. Show list formats on REPEATS box is checked.
- f. **Comments** box is checked.
- 5. Complete the HD interview using any real or dummy answers. Be sure to open all the dialogs and answer all the questions in each one, particularly when an answer opens another part of a dialog.
- 6. Open the Answer Summary page and print (or copy) all of the answers.



You now have most, if not all, the information you need to convert to a TheFormTool template.

- 1. Open the copy of the template you saved in the folder in which you are putting **TheFormTool** templates.
- 2. This will now be **TheFormTool** template, so create a Questionnaire in this template.

		Doxserá (c) 2020 Snapdone, Inc	
Label	Question	Answer	
DateNote	What is the date of the note? Format: mm/dd/yyyy	1/31/2022	
NoteAmt	What is the principal amount of the note? Format: 99999.99	25250	
BorrowerNa me	What is/are the name(s) of the borrower(s)?	Sam Jones Mary Jones [??]	
LenderName	What is/are the name(s) of the lender(s)?	ABC Lending Co. [??] [??]	
LenderAddr	What is the address of the lender?	123 Main St., Anywhere, USA	
IntRate	What is the annual rate of interest? Format: 99.99	5.25	

- 3. Use the HD answer summary page you printed to create the labels and questions and Smart Answers in the Questionnaire.
- 4. Using the HD variables in the template as a guide, insert **TheFormTool** variables next to the HD variables in **TheFormTool** template using the appropriate labels from the questionnaire and format properly.

Date: [Date of Note:Mmmm d, yyyy]{DateNote}

Principal Amount: \$[Principal amount:9,999.00]{NoteAmt}

FOR VALUE RECEIVED, the undersigned, [REPEAT Borrower:a, b, and c][Borrower name:Like This][END REPEAT]{List 1:{BorrowerName X}}, {BorrowerName X}|{if:,} and {BorrowerName X}} (the "Borrower"), hereby acknowledges itself indebted to [REPEAT Lender:a, b, and c][Lender name] [END REPEAT]{List 1:{LenderName X}}, {LenderName X}|{if:,} and {LenderName X}} (the "Lender") and promises to pay to the Lender at [Lender street address]{LenderAddr} the principal sum of [Principal amount:Nine Dollars and Twelve Cents]{NoteAmt} Dollars (\$[Principal amount:9,999.00]{NoteAmt}) with interest at the annual rate of [Interest rate:9,999.00]{IntRate}%, calculated monthly, until paid.

- 5. Verify you have formatted **TheFormTool** variables properly.
- 6. Finally, delete the HD variable.
- 7. Continue to the next HD variable.

- a. Notice the HD REPEAT command is the same as the **TheFormTool** *List* command, so be sure you have the possibility of multiple answers by using a serial text or grid.
- b. If you have multiple choice items in HD interview, you may need to look at that interview to copy the choices available into **TheFormTool** Questionnaire.
- c. The conditional parts of a HD template may need to be changed in **TheFormTool** template so that the logic is properly interpreted.

Principal Amount: \${NoteAmt}

FOR VALUE RECEIVED, the undersigned {List@:{BorrowerName@x}|, {BorrowerName@x}|{if:,} and {BorrowerName@x}} (the "Borrower"), hereby acknowledges itself indebted to {List@:{LenderName@x}|, {LenderName@x}|{if:,} and {LenderName@x}} (the "Lender") and promises to pay to the Lender at {LenderAddr} the principal sum of {NoteAmt} Dollars (\${NoteAmt}) with interest at the annual rate of {IntRate}%, calculated monthly, until paid.