Snap*Forms*FREE

Quick-Start Guide

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.

One-Page Cheat Sheet

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

1. Install SnapForms

Double-click the .zip file you downloaded to see the files it contains. Double-click the SnapFormsFree.docm file to install the program.

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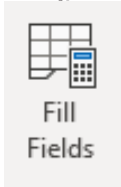
2. Create a form

Open a document or form you've used in the past, and save a copy wherever you like to store forms.

Add a Q&A Table at the bottom of the form by clicking [New Questionnaire] on SnapFormsFREE 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 SnapFormsFREE tab. Then save and close the finished form.

3. 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 SnapForms Lite tab. Done!

4. For later

This manual and the Expert User Guide are available at https://snapdone.org/snapforms-downloads, 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 SnapFormsFREE.

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.

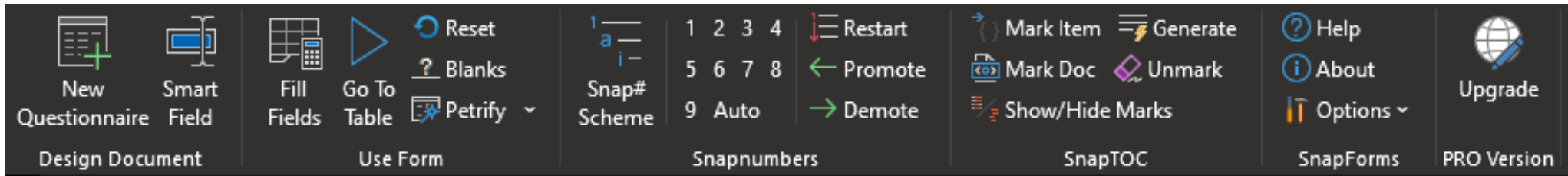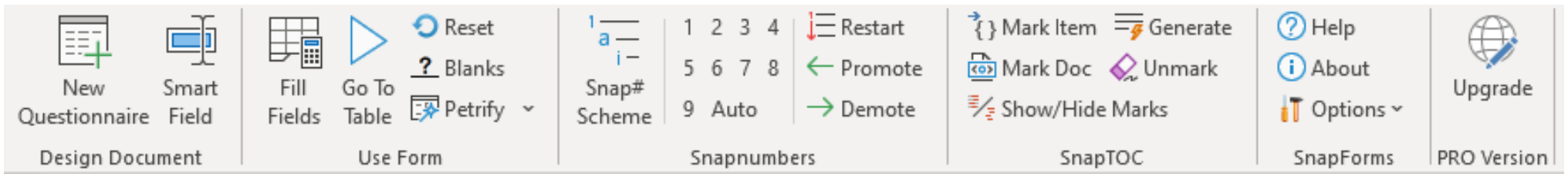| SnapForms (c) 2020 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

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

Signed:

_____

{SIGNER}

Meet the Buttons

SnapFormsLite Version

Installing SnapForms

Step 1: Open the Installation File

SnapForms.dotm

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

Double-click that file to install **SnapForms**.

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

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 **SnapFormsLite**. Click that tab to reveal The**FormTool** commands.

Don't see it??

Try restarting your computer. If that doesn't work, please contact us so we can help you get started (snapdone.org).

Updates
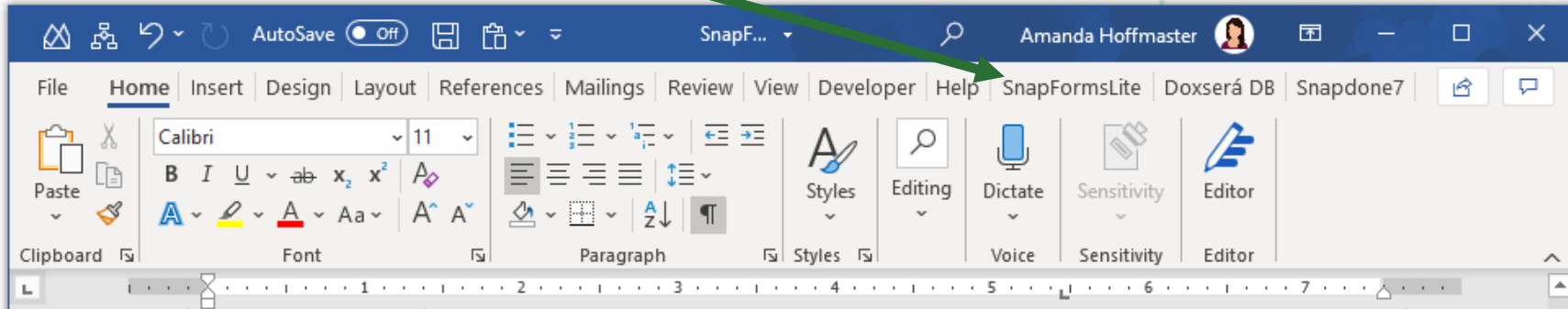
Check https://snapdone.org/snapforms-downloads periodically for updates to **SnapForms**.
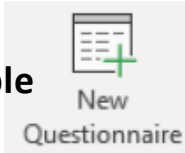
Creating a Form

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

New Questionnaire

Click ▦**Table** on SnapForms 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

SnapForms (c) 2020 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

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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** 0when your cursor is in the table's last cell.
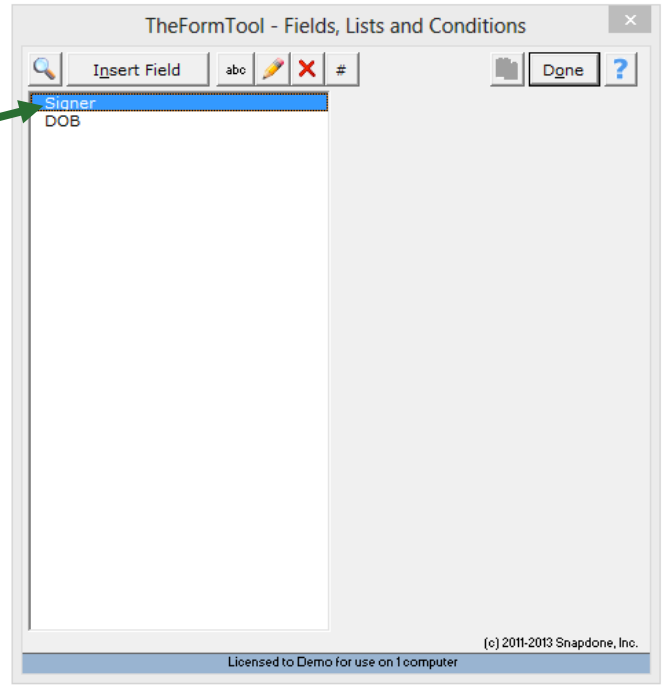
Step 2: Add Fields

Smart Field

Select "Abigail Bentley" and click 🖐 **Field** to open the screen shown below.
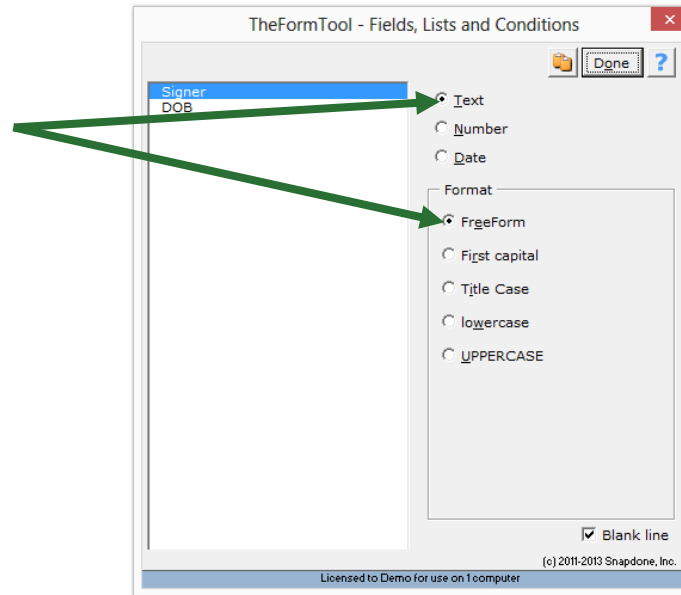
My name is Abigail Bentley. I was born on April 17, 1960.

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**.

TheFormTool - Fields, Lists and Conditions

🔍 | Insert Field | abc 🖊 ✗ # | 📖 | Done | ?

Signer
DOB

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

TheFormTool - Fields, Lists and Conditions

Signer
DOB

- Text
- Number
- Date

Format
- FreeForm
- First capital
- Title Case
- lowercase
- UPPERCASE

☑ Blank line

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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 [Smart Field icon] Smart 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
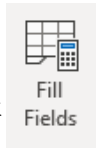
Type your answers in the Q&A Table, like so:

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

Step 2: Fill in the Form

Click **Fill Fields** 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
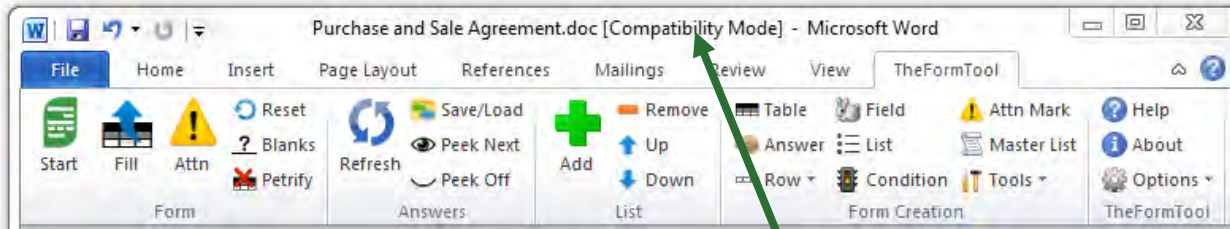
Look at the top of the Word screen. If you see "Compatibility Mode" beside the document name, it needs to be converted by following these steps:

[W] **Word 2007**	[W] **Word 2010 and** [W] **Word 2013**
Click the [icon] **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**). **Snapdone** 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 The**FormTool**'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.

TheFormTool Quick-Start Guide	You're reading it now!
Online training course	Click here to browse a collection of short, graduated videos that will take you from the basics to rocket science. We strongly encourage all users to review the Beginning and The Basics levels of The Learning Curve. Doing so will provide a strong foundation for productivity with the software and save an enormous amount of time.
Timely updates	If you haven't already done so, click here to sign up for our newsletter to stay informed of updates and improvements.
The Learning Curve weekly webinar	Every Wednesday morning (8am PT, 1500GMT), our very best, most experienced technical experts and service professionals are available to answer your questions, address your issues, and listen to your suggestions. Click here to join us.
And the kitchen sink	Our general help page is here. Everything else you need is here at the Service Center, where you may search or browse hundreds of questions, answers, tips and suggestions, and contribute your own. You may also open a service ticket if you're having any trouble with the program.

Created by:

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