




To Make a Document into a Form Template


Convert an existing document to a form

- a) Open the document that is to be converted.
- b) Make any required changes including deleting any text that is specific to that client.
- c) Click **view, toolbars** and tick **Forms** to open the Forms Toolbar
- d) Click on your document where the first point of text entry should be
- e) Click  on forms toolbar
- f) Click on your document where the next point of entry should be
- g) Click  on forms toolbar
- h) Repeat f) and g) as many times as you need to.
- i) Click  to protect the form from spoiling by accident

Convert it to a template

- a) While the form is locked, click **File - save as - document template** - Give it a meaningful name.
- b) The next time you open WORD you can click file, new and select the document template that you saved.
- c) This will create a new document based on your template. Any changes you make to this new document will not affect the template for next time.

Fill in your form

- When the new document opens, you will see grey areas. This is where you should type. Pressing tab on the keyboard will move the cursor to the next field. 
- This document can be saved and printed in the usual way.
- The grey areas will not show on the printed document.