

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

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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.

HD Template

Date: [Date of Note:Mmmm d, yyyy]

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 (click on Field Appearance in the upper left of the HD Author screen).

4. Be sure:

- a. **Abbreviate Placeholders** box is NOT checked.
- b. **Show placeholder types in addition to names/expressions** is checked.
- c. **Show Formats** box is checked.

The screenshot shows the 'Field Appearance' dialog box with the following settings:

- Placeholder Fields:**
 - Abbreviate placeholders (show only placeholder types)
 - Show placeholder types in addition to names/expressions
 - Show formats
- Instruction Fields:**
 - Abbreviate instruction fields
 - Show list formats on REPEATS
- All Fields:**
 - Comments
- Field Delimiters:**
 - Left: []
 - Right:] [
- Update fields
- Buttons: Save, Cancel

Red arrows point to the 'Placeholder Fields' section, the 'Show placeholder types...' checkbox, the 'Show formats' checkbox, the 'All Fields' section, and the 'Comments' checkbox.

- 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.

Answer summary	
Template: promissory note plain	
Date of Note Date of Note	31 JAN 2022
Principal amount Principal amount	25,250
1: Borrower Borrower name	Sam Jones
2: Borrower Borrower name	Mary Jones
1: Lender Lender name	ABC Lending Co.
Lender street address Lender street address	13 Main St., Anywhere, USA
Interest rate Interest rate	5.25

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
BorrowerName	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.

Date: {DateNote}

Principal Amount: \${NoteAmt}

FOR VALUE RECEIVED, the undersigned {List 1: {BorrowerName 1X}}, {BorrowerName 1X} {if, } and {BorrowerName 1X} (the "Borrower"), hereby acknowledges itself indebted to {List 1: {LenderName 1X}}, {LenderName 1X} {if, } and {LenderName 1X} (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.