



FormTool User Guide

Thank you for your recent purchase of FormTool and ICC The Compliance Center Form Filler templates for use with this software. ICC The Compliance Center has included some general instructions on how to use FormTool to your advantage.

1. Your company works with a number of customers who regularly order items from you. By using the database feature, you can save customer information and query the database and have most of the information entered into your form. With minor revisions, you are done! To utilize this feature, please follow the **Instructions to Create and Use a Database**.
2. If you are going to be using multiple copies of FormTool (each computer **must** be licensed to use FormTool individually), then it is suggested that the database should be stored on a network location. It is suggested that you work with your company's IT department to set this up.

Technical Support Information

To receive the fastest response to your technical questions, please complete the following check list before you call or send e-mail:

- You may already have the information you are looking for. Before calling, check your documentation thoroughly. Let the technician know what you've tried.
- Be in front of the computer, with the computer on if you are calling on the phone.
- Record the exact sequence of events that created the problem. Make sure that you can reproduce the problem by following the same series of steps. Know the results of any steps you have undertaken to solve the problem.
- Have the name and file date of the application. To get the exact version number, select Help, About, FormTool.
- Know the type of computer and Windows version you use.
- Record the exact wording of any error messages.
- Be sure to give your name and return e-mail address or fax number if you want a reply via e-mail or fax.

Installing FormTool

Note: Before installing FormTool, close all programs that are running, including screen savers and third-party memory managers. Also, remove any floppy disks from your floppy drive(s).

Insert the FormTool CD into your CD-ROM drive. The installation will begin automatically. If it doesn't, follow these instructions.

To install FormTool from CD:

1. Go to My Computer.
4. Navigate to your CD-ROM drive.
5. Right click on FormTool_7.zip and extract all files to your desktop
6. Double click on FormToolTrial700 and follow on screen instructions.

To install FormTool from download:

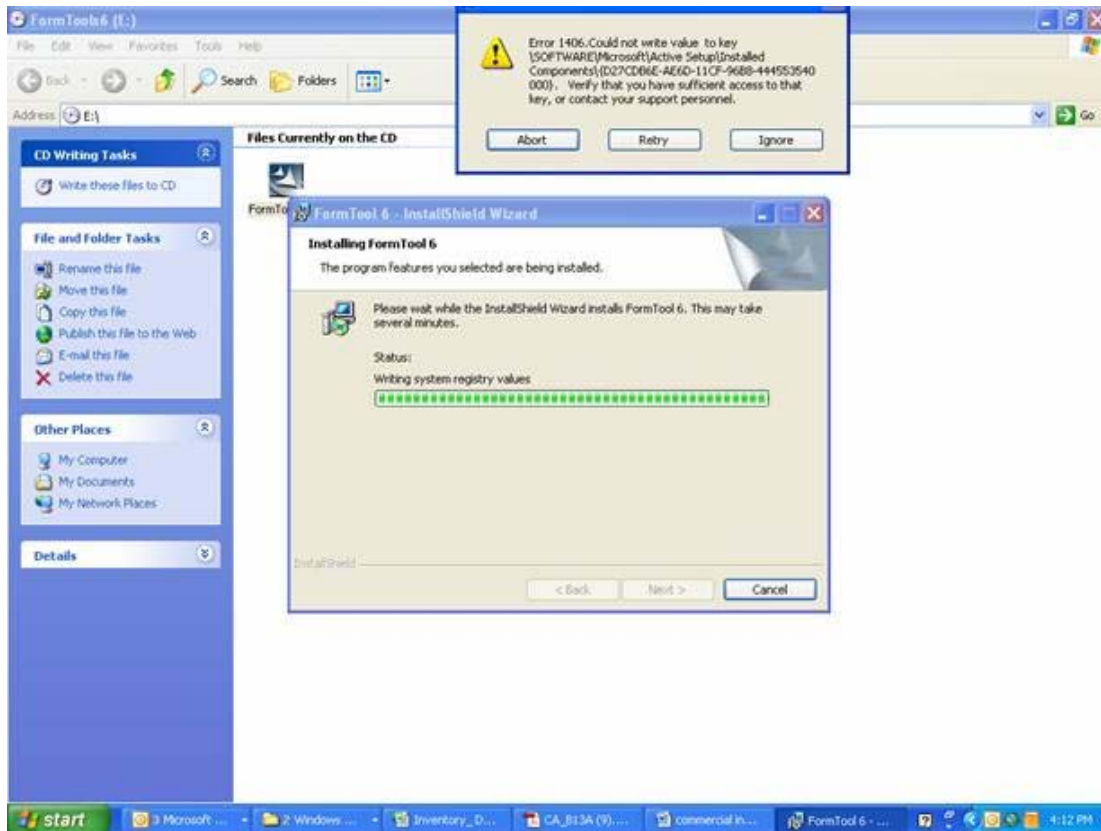
1. Navigate to where the zip file was saved.
2. Right click on FormTool_7.zip and extract all files to your desktop
3. Double click on FormToolTrial700 and follow on screen instructions.

Troubleshooting Installation Errors

While installing FormTool on some computers two possible errors may happen. Below I have included a screen shot of the error along with an explanation on how to fix the error.



This error message is stating that Flash8b.ocx is failing to register during the installation. To register this file, manually open a command window (Start, Run, type CMD, click Ok) and type the following command " **regsvr c:\Windows\System32\Macromed\Flash\Flash8b.ocx** " (minus the quotation marks) and press [Enter]. You should get a window stating that the file was registered successfully, click Ok. Close the command window and try installing FormTool again.



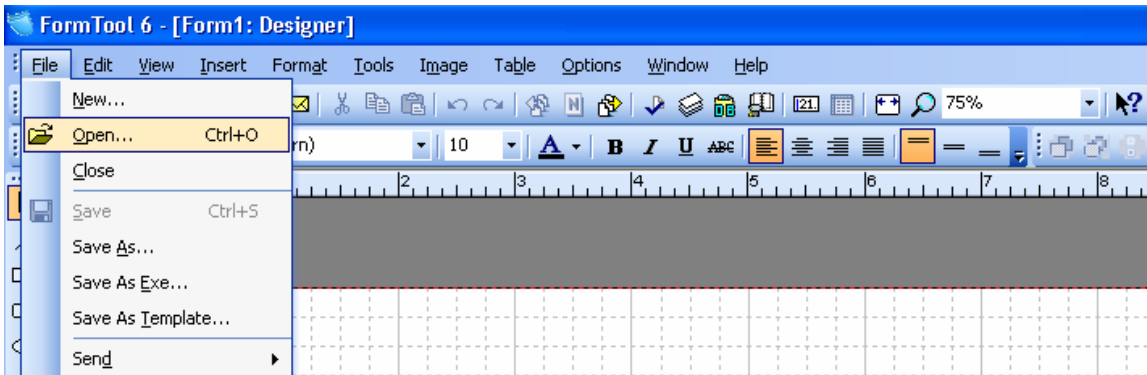
This error message is stating that the user installing FormTool doesn't have sufficient privileges to write the registry key (specified in the error message) into the Windows registry. This user needs to make sure that he or she is logged into the computer as someone that is a part of the Administrators group and try installing again. If you are not logged on as an Administrator, clicking on "Ignore" will continue the installation process but there is no guarantee that FormTool will be installed properly.

Instructions to Create and Use a Database:

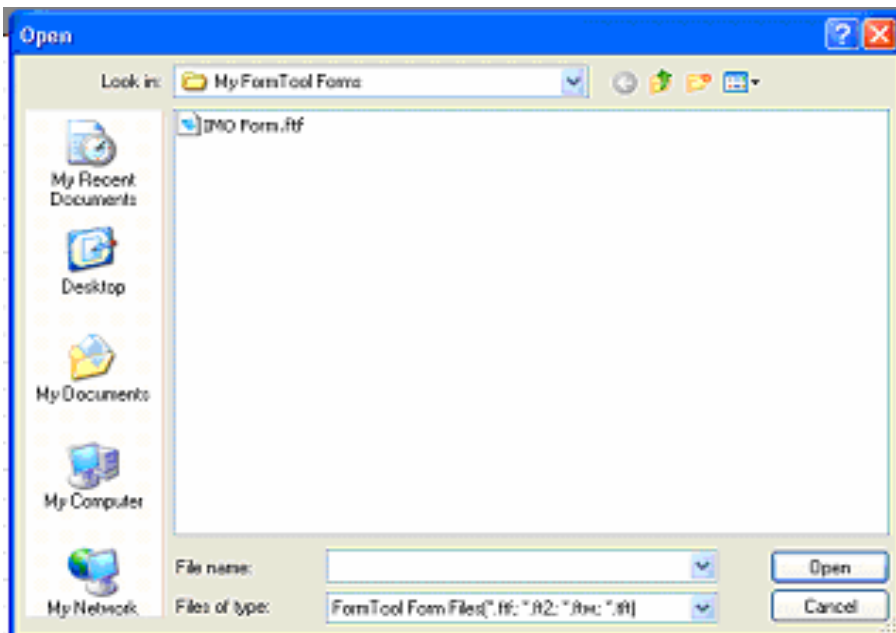
Whether you want to use a database to keep a record of all of your billing documents or to keep commonly used shipping information available for ease of use, you'll want to link your copy of FormTool to a database. We suggest the Access format, as it appears to be the most dependable database format for use with FormTool.

Please follow the steps listed below.

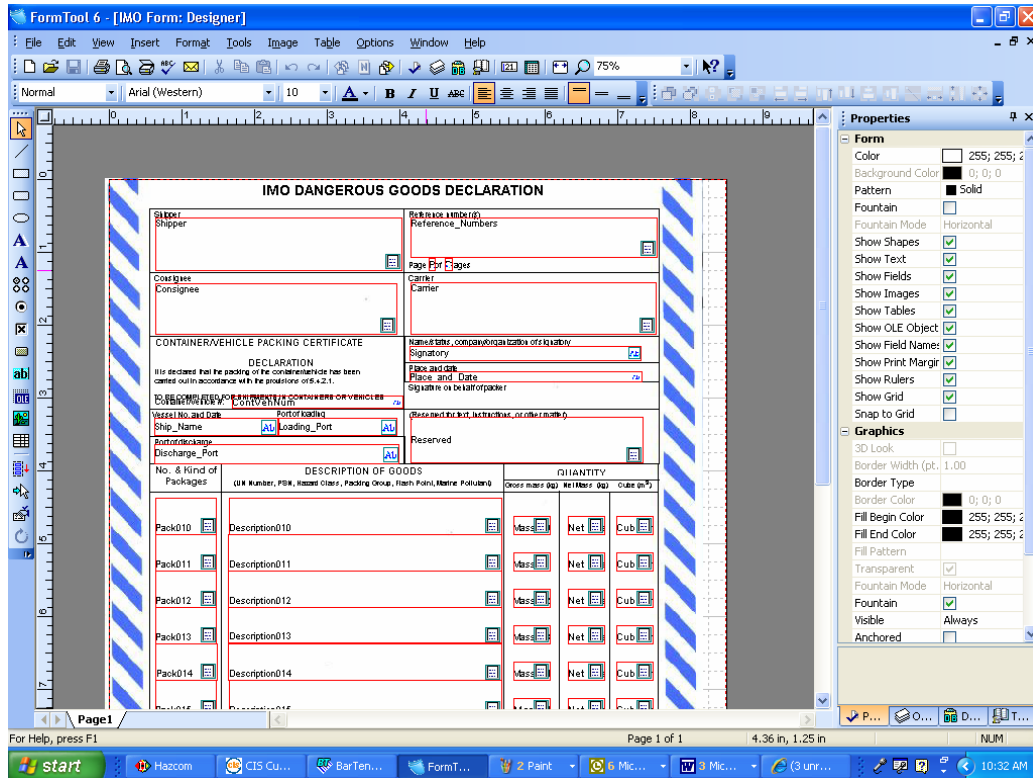
1. After opening FormTool, please access the File menu, and select the Open option, or use the keyboard shortcut Ctrl+O.



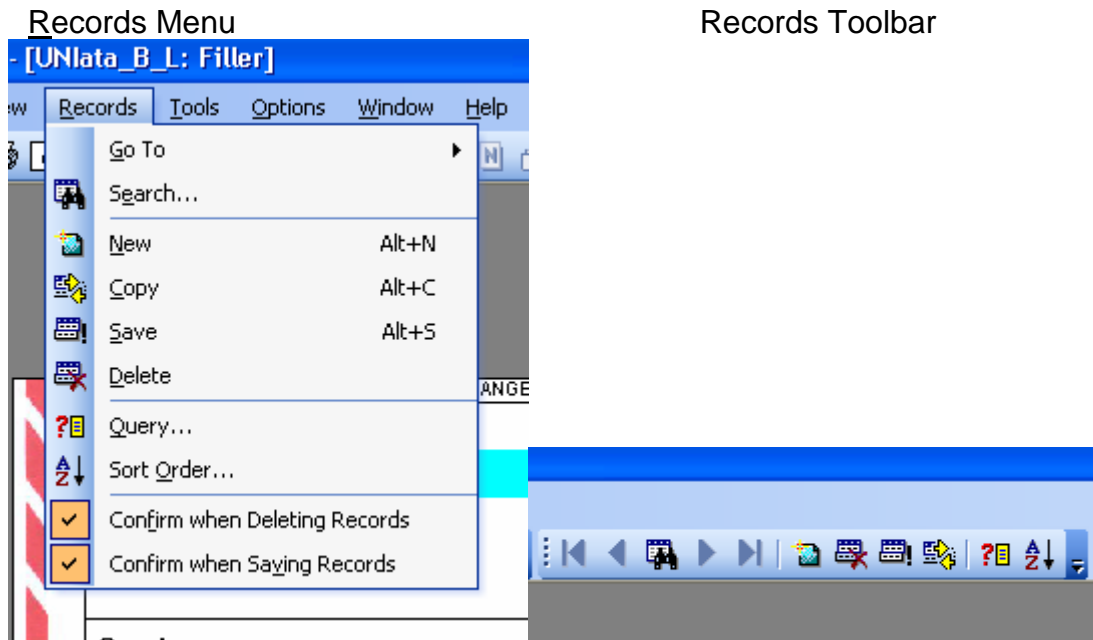
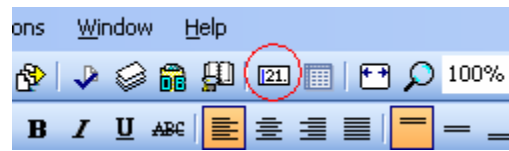
2. Navigate to the location where you have the forms stored. *NOTE: If you are working off of the CD that was shipped containing your forms, you will be unable to link a database to the form. Please copy your forms to either your computer or a network location, depending on who requires access to these files. Open the form in question.* For the purposes of this demonstration, we will be using the IMO form.



After opening the form, as seen below, it will appear in your workspace in design view. The red blocks represent fields that will be filled in by the user and stored in the database.



3. Using the database features is achieved as follows. You can use the Records menu (in Filler mode) or the small toolbar specifically intended for records. In order to get to Filler mode, select the button below.

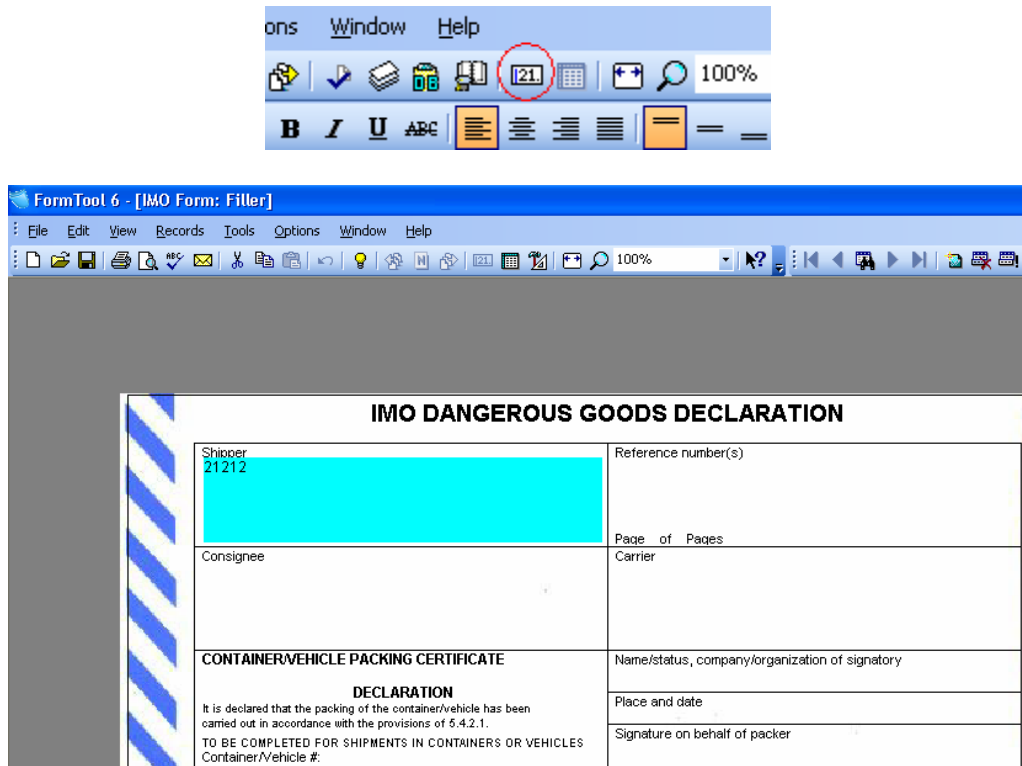


4. The Records tools are as follows...

- **First / Previous / Next / Last** – Indicated as arrows in the Records toolbar, these icons allow you to move through existing records. They are disabled until at least one record is stored in the database.
- **Search** – Searches all records based on the selected field.
- **New** – Creates a blank record with no fields filled in.
- **Copy** – Creates a new record with fields filled in identical to the current record.
- **Save** – Saves the current contents of the record. Please note that after any changes, this should be pressed, as other navigation or editing tools will clear changes if focus is moved from the current record.
- **Delete** – Deletes the current record.
- **Query** – Searches all records with advanced search options.
- **Sort Order** – Sorts the records by specified fields.

OTHER USEFUL INFORMATION:

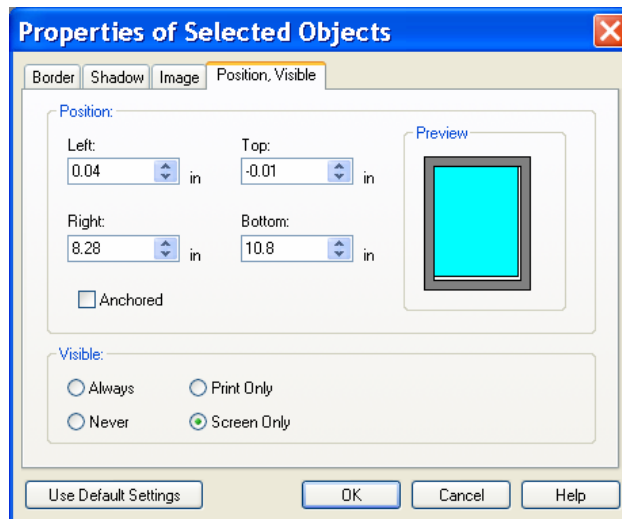
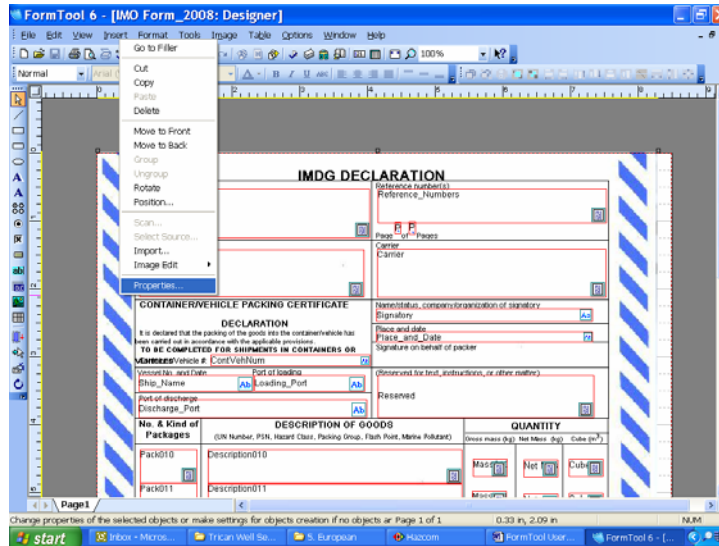
If you do not wish to use the database function of FormTool: in order to access the Filler mode, in which you are able to fill out the form and print it to provided stock paper, please click on this icon in the toolbar. Design mode comes up by default.



Tab is used to go from one field to another. Tabbing from a field that has selected an auto fill option (based on previous entries) will accept that auto fill option by default. In order to deny an auto fill, **Click** on the next field.

Printing Your Form

To disable or enable the printing of graphics that are included in your form you need to be in design mode and need to right click on the graphic and choose properties.



To print the form with the selected graphic choose “Always”. To NOT print the selected graphic choose “Screen Only”.

If you have any further questions about FormTool or Form Filler templates created by ICC The Compliance Center, don't hesitate to contact us at our Mississauga office at 905-890-7228 extension 234/223, or through our toll-free number 1-888-977-4834, and request to be transferred to software technical support. You can also email our support specialist at <mailto:nelson.roque@thecompliancecenter.com>

