

Automated Forms QuickStart Guide

After purchasing your automated forms, you will receive an email with the subject line 'Downloadable Item Alert' from NYSBA Customer Service, mrc@nysba.org. Click on either of the two links in the email to access your automated forms. The zip file link will begin the forms download process immediately. The 'NYSBA portal' link will require that you log in with a username and password before beginning the download process.

Install the Automated Forms

1. Click on the zip file link to begin the immediate download of the forms file. Choose to either 'Open' or 'Show in folder'. 'Show in folder' allows you to copy and paste the file to a location of your choosing before opening.
2. Click Product Installations. The Install menu appears.
3. If HotDocs Player is not already installed, click Install HotDocs Player. Follow the on-screen prompts.
4. Click Install Automated Forms. Follow the on-screen prompts.

Opening the Library

The Automated Forms library organizes the templates in your forms product.

To open the library

1. Click the **Start** button on the taskbar. The **Start** menu appears.

2. Type **HotDocs**.

3. Click the Automated Forms product name you want to use. HotDocs Player opens, displaying the list of templates.

Assembling a Document

HotDocs templates allow you to complete customized documents.

To assemble a document:

1. At the Automated Forms library window, locate and select a template.
2. **Double Click** or Click **Assemble**. The **Answer File** dialog box appears.
3. Select an answer file and click **OK**. The assembly window appears.
4. Enter your answers in the fields of the dialog pane on the right. You can move between fields by pressing **Tab**.
5. Move to the next dialog by:
 - Clicking the **Next** button in the navigation bar.
 - Pressing **Enter**.
 - Pressing **Page Down**.
 - Clicking any other dialog in the interview outline (the pane on the left).

Continue entering answers until you reach the **End of Interview** dialog. Follow the instructions to save or print your completed form.

Saving Answers

By saving information in answer files, you can reproduce exact copies of a document, or assemble other documents that use the same answers.

To save answers in an answer file:

1. At the assembly window, click the **Save Answers** button. If you are working with a new, untitled answer file, the **Save Answer File** dialog box appears.
2. Provide a file name, title, and description (optional) for the answer file.
3. Click OK. The answer file is saved.

Opening a Completed Document

After completing a document and saving it, it is no longer connected to the original template from the Automated Forms library. You can open the file for printing or editing, but any changes will only be made to the custom document.

To open a completed form document (HPD, HFD format):

1. Click the **Start** button on the taskbar.
2. Type **HotDocs Filler**. **HotDocs Filler** opens.
3. Choose **Open** from the **File** menu or the toolbar.