

How to Make a Form in Word

Creating forms is easy and fun in Word. You use controls to display data or choices, perform an action, or make the user interface easier to read.

Design and lay out the form.

When designing a form, you can sketch a layout first, or use an existing form as a guide. Many forms, such as contracts, consist solely of text, with form fields inserted throughout the document so users can provide specific information. Other forms are based on a grid, in which you can combine features such as tables, which help you align text, and form controls such as a text box, check box, scroll bar, or command button, that lets users control the program.

Add form fields for text boxes, check boxes, and drop-down lists.

You use the Forms toolbar to insert objects in a form that users will view and complete in Microsoft Word or in print. 

To access the toolbar, go to **View** menu → **Toolbars** → **Forms**.


In the document, click where you want to insert the [form field](#).

Fill-in field

Insert a **fill-in field** where users can enter text. Click Text Form Field .


You can specify a **default entry** so that the user does not have to type an entry except to change the response.

Add a Check box

Insert a **check box** next to an independent option that users select or clear. Click Check Box Form Field .

You can also use this button to insert a check box next to each item in a group of choices that are not mutually exclusive — that is, users can select more than one.

How about Drop-down list?

Insert a **drop-down list box** that restricts available choices to those you specify. Click Drop-Down Form Field . If needed, a user can scroll through the list to view additional choices. If necessary, edit the appearance of the controls.

You can add, remove, or change the order of items in a drop-down list form field. Double-click the drop-down form field you want to change.

To **add** an item, type the name of the item in Drop-down item box.

To **delete** an item, click the item in the Items in drop-down list box, and then click Remove.

To **move** an item, click the item in the Items in drop-down list box, and then click the Move arrow buttons.


When finished, click **OK**.

Formatting fields

Change the **formatting** of form field results.

Select the form field you want to format.

On the **Format** menu, click **Font**. Select the options you want.

For Help on an option, click the question mark , and then click the option.

Display or remove shading


Click Form Field Shading  on the Forms toolbar.

Note: The shading appears on screen so users can quickly identify the fields they need to respond to. **This shading does not print.**

Set or edit properties for the form field.

Double-click the form field you want to change.

Change the options you want, and then click OK.

For Help on an option, click the question mark , and then click the option.

Add Help or automation to the form.

Do one of the following:

1. Add help text to a form control.

Double-click the form field to which you want to add Help text.

Click Add Help Text.

To display Help text in the status bar, click the Status Bar tab.

To display Help text in a message box when a user presses F1, click the Help Key (F1) tab.

Select the options you want.

2. Automate your form. Create the macros you want to use, and store them in the form template. If another template contains macros you want to use, copy them into the form template.

Double-click the form field you want to assign a macro to.

To run a macro when the insertion point enters the form field, click the macro in the Entry box.


To run a macro when the insertion point exits the form field, click the macro in the Exit box.


Note: If you store the entry and exit macros in your Normal template and then distribute a form to others, the entry and exit macros may not run because the macros won't be available to the users. You must store macros you use in the form in the form's template.

Protect the form from changes.

You can protect a form when it is in progress, and also protect the final version to prevent users from making changes as they fill it out.

1. **Protect** a form as you are designing or changing it. This method provides a helpful way to test how the final version of the form will work.

On the Forms toolbar, click Protect Form .

Note: In previous versions of Microsoft Word, if you protected a form after making changes, all form fields were automatically reset to their original state. In this version, that does not occur. You can manually reset form fields by clicking Reset Form Fields  on the Forms toolbar.

2. **Prevent users from making changes to a form.** Before you distribute a form that users will view and complete in Microsoft Word, you must protect it so that users can enter information only in the designated areas.

Note: When you protect a document by using the following method, any information in form fields will be reset.

On the Tools menu, click Protect Document . Click Forms.

Save your form

You can save your form as a template [.dot] or as a document [.doc]. REMEMBER to protect your form before distributing.

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