

Volume Enhancements Included in this Update

Family Law – We added three new forms pursuant to changes by the Florida Supreme Court: *Income Deduction Order*, *Notice to Payor*, and a *Notice of Filing Return Receipt*. And, because we previously provided you an *Income Deduction Order* in ProDoc, we updated the ProDoc language in this form to conform to that from the Florida Supreme Court.

Lipman's Wills & Trusts – We added six new forms and revised 433 forms, including:

- We modified and improved the fee agreements so that you now have more options available when creating these forms.
- We added a new form that revokes your client's existing revocable trust. The form comes in six different versions depending on who created the trust that is being revoked.
- We revised the deed forms so that you can now draft an unlimited number of deeds at one time. Each of the deeds will be sent to a single output file, with one letter following the other.
- We improved and renamed the forms that were previously called *Memorandum Regarding Transfer of Accounts*. We reworked the forms so that they are now letters from your client to the financial institutions. And, you can now choose to draft an unlimited number of these letters at one time. Each of the letters will be sent to a single output file, with one letter following the other.
- You now have the option to draft trust agreements without withdrawal rights in all of the irrevocable trusts that contain **Crummey** withdrawal rights.
- We removed the **Widow and Orphan** format settings from every form.

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Your ProDoc Installation KeyCode Is on the Shipping Envelope

You will need a 20-character **KeyCode** to install this update. You'll find it on the envelope in which the CD shipped.

We strongly encourage you to keep the shipping envelope in a safe place so you have your KeyCode available when you install the update.

View the Specific Changes to a Particular Form in a Volume

Here's how you can view the specific changes to a particular form in a ProDoc volume of this update:

Open ProDoc and click on **Help►About the Volumes**. Then click the volume of your choice. You will now see a page with three links at the top: **Authors**, **Change History**, and **Forms List**.

Click on the **Change History** link and you will see information about the changes made to each form in this update.

Incidentally, by clicking on the **Forms List** link instead of the **Change History** link, you will view a complete list of all of the forms in the selected volume.

ProDoc and SOS Database Enhancement Released

When you install this update, you are beginning the process of updating your ProDoc database with a more robust technology.

The installation process may replace the existing database with the new technology. This enhancement is more likely to continue to perform correctly through situations such as:

- minor degradation of the operating environment caused by fluctuating electrical power conditions,
- other hardware or network interference,

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There will be places where the forms previously looked better than they do now, and you will find that certain provisions, notary acknowledgments especially, start on one page and end on the next. However, the formatting has been improved a great deal, especially for users of Microsoft® Word.

Email address field added to the attorney signature blocks – We added a field to the signature block to hold the email address for the attorney. If you do not customarily use our Default Answer Sets feature, this would be a great occasion to begin. By setting your email address as a default answer the first time you generate a form, you do not have to do so again. For information about creating and using Default Answer Sets, visit [http:// tinyurl.com/pd-default-answers](http://tinyurl.com/pd-default-answers).

We added the email address fields to the volume-specific signature blocks for the Attorney-Client and Mortgage Foreclosures volumes and to the generic signature blocks for the Family Law, Litigation, Probate, Criminal Law and Guardianship volumes.

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- under catastrophic failures such as a complete loss of power, hard drive failure, or
- interruption of network connections between workstations and the file server.

We believe that the improved reliability will greatly reduce any down time you may experience in the event of database issues.

We also expect that the new technology will continue to perform responsively even as the database load increases through the addition of more users or as a greater amount of client and case data is stored.

What to Expect During the Installation Process

During the installation process the software will verify the integrity of the data in your existing ProDoc/SOS database. If no issues are discovered, your data will be converted to the new database format and the installation of the update will proceed in the normal fashion.

However, if an issue is identified during the installation process, your data will not be converted to the new format and the update will continue in the normal fashion. However, the program will alert us over the Internet that there is an issue. Our Technical Support team will contact you within a few weeks so they can assist with the completion of the database conversion.

Since we will be alerted to database issues via

the Internet, please be sure you have an Internet connection established while you install this update.

Your data will not be visible to us at any point during this conversion process. Your data will be automatically backed up on your computer during the conversion process and we will not have access to it.

And, **none of your completed documents will be affected by this process.** Your documents completed in ProDoc are saved in a completely different directory and will not be affected during this conversion.

Where/Who to Call for Assistance

If you experience any issues or if you have questions about this process, please contact our Technical Support team at 800-759-5418, option 3.

30-Day FREE Trial of Any ProDoc Product

Remember that we have a long-standing offer to enable you, as a ProDoc subscriber, to use any ProDoc product/volume FREE of charge for 30-days.

This is an excellent way for you to determine whether that product/volume makes sense for your practice.

For your free 30-day trial, call us at 800-759-5418, option 0.

Your ProDoc Account Information Is Available Online

You can now go online and review your ProDoc subscription information, to find your Installation KeyCode, and your Registration Code(s). All this and more is available through MyAccount on the Thomson West web site.

Visit *MyAccount* at <https://myaccount.west.thomson.com/myaccount>.

Who to Call for Billing and/or Customer Support Issues

We have a special team dedicated to Customer Support issues for ProDoc customers. Call 800-759-5418. This is the "ProDoc only" phone number for obtaining Sales information (option 1), Customer Support (option 2), free Technical Support (option 3), and Free Training (option 4) and it is dedicated exclusively for ProDoc customers. Call this number and you work with the teams that are the most knowledgeable about ProDoc.