ProDoc Tech Tip

Using Clients and Cases

The ability to use case files for each client and case is one of the most powerful features of ProDoc. Answers you provide for clients/cases are automatically saved so you enter data only once for the life of each case. This slashes the time needed to assemble your documents and reduces data keying errors.

If you fully utilize the Clients and Cases feature, you will save other important client and case information such as address and contact information on your client. If ProDoc is installed on a network in your firm, entering this data makes it readily available to anyone on the network.

Additionally, you can inactivate clients and cases to clear out your directory of closed cases. However, since you are inactivating them and not deleting them, you can quickly reactivate them in the event they come back with a new case or a follow up on an old case.

1. Adding a New Client

To add a new client and case in ProDoc:

A. Click the **Client/Case** icon on the ProDoc toolbar as shown in ***Figure 1***.

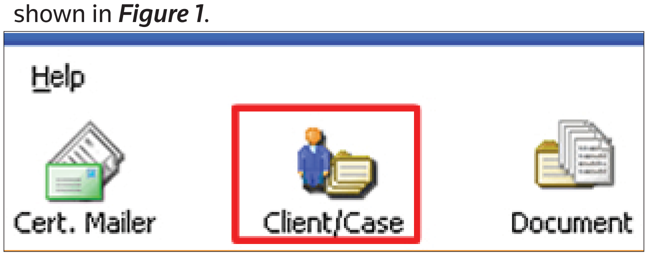

Figure 1 - Click the Client/Case Icon to Begin

Figure 2 shows you how the **Client/Case Manager** window will appear after you have added several clients and cases. However, when you first begin, this window will be blank.

B. The functions on this page include:

a. The **Now Showing** field, ***Figure 2. A***, shows that the default view is to show only active cases. Clicking the drop-down arrow displays other options to be covered later.

b. The **Show Cases** button, ***Figure 2. B,*** enables you to simultaneously open all your clients and display the cases under them.

c. The flat expand button, ***Figure 2. C***, opens another window to the right that enables you to enter details about the client and/or case.

d. The **New Client** button, ***Figure 2. D***, enables you to create new client entries.

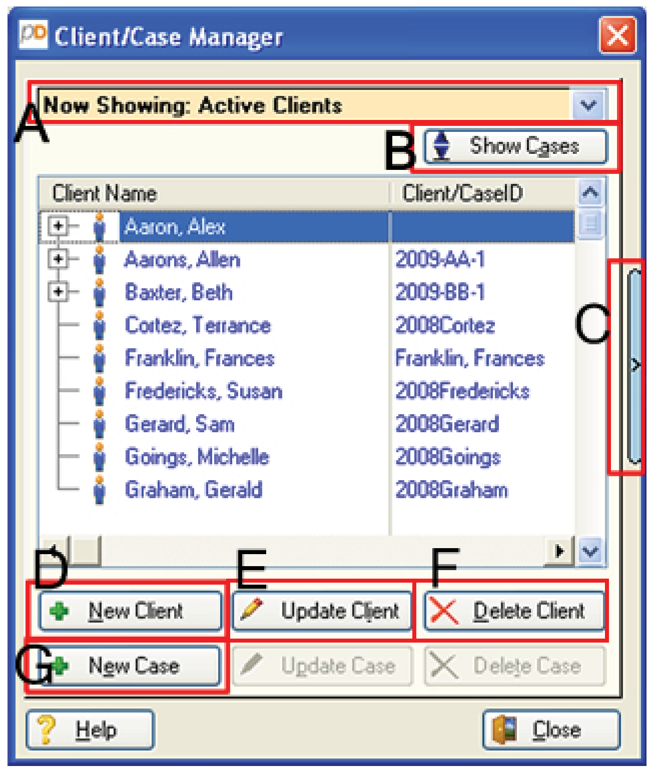

Figure 2 - The Client/Case Manager Window

e. The **Update Client** button, ***Figure 2. E***, is used for updating the information for an existing client.

f. Click the **Delete Client** button, ***Figure 2. F***, to delete a client entry. However, in most cases it is probably wiser to inactivate that client. See Section 4, Managing Clients.

g. After creating a client you will click the **New Case** button, ***Figure 2. G***, to create your new case. The grayed out ***Update Case*** button is only accessible when a current

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case is highlighted.

C. Enter your first client by clicking on the **+ New Client** button, ***Figure 2. D.*** The **Client Will be Added** window opens as shown in Figure 3, except that it will be blank. The **Client Information** and **Case information** area to the right is now viewable because the flat expand button, similar to ***Figure 2. C*** was clicked. Enter as much information as your care to. Remember that the more information you enter the more time you can save for everyone since this information will be so easy to locate.

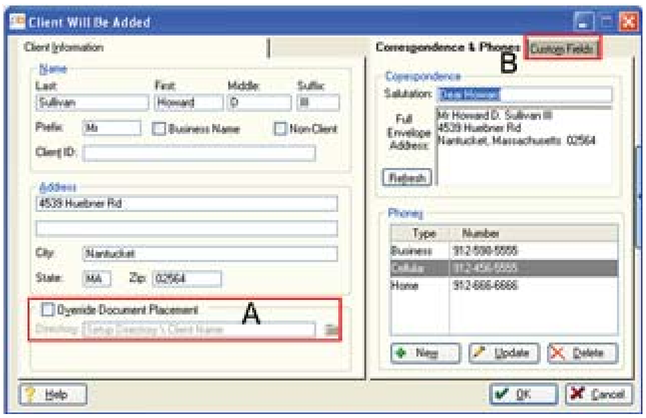

Figure 3 - The Client Will Be Added Is Now Accessible

D. We suggest that, whenever possible, use the default setting, ***Figure 3. A***, for the location in which to save the documents. If your firm has a preferred scheme for saving completed documents, check the **Override Document Placement** box and browse to set your preferred directory.

E. After entering the client information, enter the information in the **Correspondence & Phones** area.

F. Enter phone information in the **Correspondence & Phones** area by clicking the **New** button. In the window that appears, select the type of phone and enter the number in any format you like. Then click the **Customer Information** tab, ***Figure 3. B***.

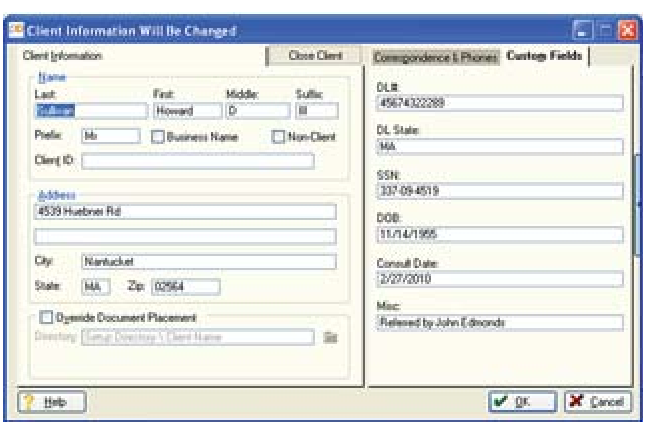

Figure 4 - Add Client Information in the Custom Fields

To save time, if you wish to copy the client address information into the **Full Envelope Address** area, click the **Refresh** button.

Be sure to add a **Salutation** for correspondence.

If you have not renamed your **Custom Fields** the field labels will be generic. Enter any information important to the case that you believe is important. In the last section of this Tech Tip we will tell you where to find information about renaming your custom fields.

G. When you are finished, click the **OK** button. Then click the **New Case** button to proceed to **Adding a New Case**.

2. Adding a New Case

A. Click the **New Case** button, ***Figure 2. G***. The **Case Will Be Added** window, ***Figure 5***, will display.

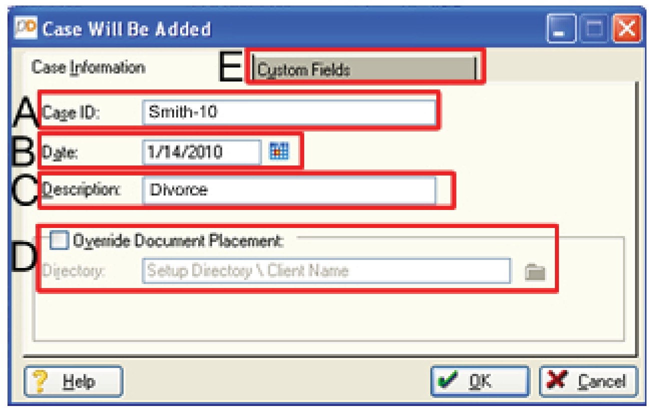

Figure 5 - The Case Will Be Added Window

B. Fill in the following information as appropriate.

a. If your firm uses **Case IDs**, enter the appropriate one here, as shown in ***Figure 5. A***. The ID must either be blank or be a unique set of characters for each case.

b. The **Date** field, ***Figure 5. B***, will default to the date you create the case but you can change it.

c. The **Description**, ***Figure 5. C***, is the identifier most often used to select a case for document assembly. Enter a unique name or phrase in the field. It can be any word, number or combinations. Common uses are short descriptions such as ***Divorce*** or ***Estate Planning***.

d. Just as with a client, you can designate that the documents you generate for this case are saved to a specific directory. Check the box to the left of **Override Document Placement**, ***Figure 5. D***, only to override the default setting for this particular case. You can type in the path or click the browse button. The Browse for Folder window will appear; use this to find the desired location.

C. The **Filename** field (not shown here) is only visible if you chose in setup to have ProDoc automatically ***use the form***

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title for filename. Use this field to enter a file name to store all files for the case. Specifying the filename here prevents manually typing it for each document assembly session.

D. Update the **Custom Fields** for the case by clicking on the tab, ***Figure 5. E***, if you set these up earlier and wish to enter appropriate information. The **Case Information Will Be Changed** window, ***Figure 6***, will appear.

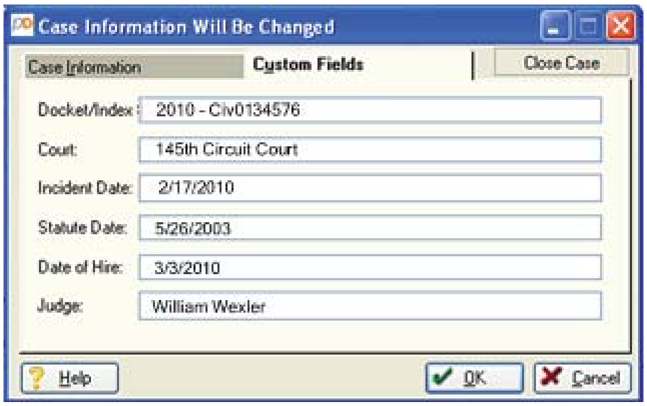

Figure 6 - Enter Custom Field Information for the Case

E. Fill in the appropriate information in the fields and click **OK** to the **Client/Case Manager** window.

F. You are done and ready to create your documents for the case so click **Close**.

3. Using a Client and Case to Assemble a Document

A. Click on the **Assemble Document** icon on the **Quick Click Menu**. This opens the **Starting Document Assembly** window, ***Figure 7***. (The overlaid **Select a Case** window will not yet be visible.)

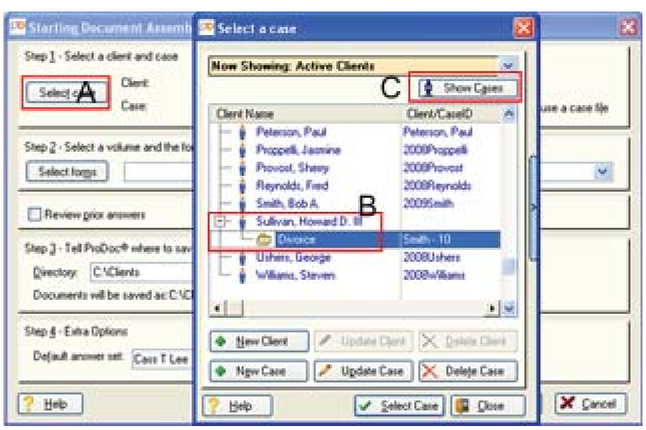

Figure 7 - Select the Client and Case

B. Click the **Select case** button, ***Figure 7. A***, to open the overlaid **Select a case** window.

C. Scroll to find the correct client and click the **+** sign to the left of the client. The **+** sign changes to a **-** sign and reveal the case(s) created for the client (***Figure 7. B***). Clicking the **Show Cases** button, ***Figure 7. C*** opens all clients and reveales all the cases under each client.

D. To select a case for assembling documents, you can double-click a displayed case, or click a displayed case, then press the **Enter** key or click the **Select Case** button.

E. You'll return to the **Starting Document Assembly** window, which now displays the selected client and case.

F. Select the form or forms for assembly, make any additional necessary choices on the **Starting Document Assembly** window, and generate your documents, knowing that ProDoc will save all data you enter for the next documents you generate for this case.

4. Managing Clients and Cases

If yours is a busy firm, it does not take long until the **Select a case** window is full and the time it takes you to scroll to find the client irritates you. The temptation is to simply delete those clients with closed cases.

However, if one of your deleted clients returns with a new case, or causes you to reopen a formerly "closed" case, you'll probably regret having done so. A better choice is to ***close*** the client in ProDoc so you can later activate if necessary.

A. Close a Client

a. Click the **Client/Case** icon as shown in ***Figure 1***.

b. Click the **Update Client** button as shown in ***Figure 2, E***.

c. Click the **Close Client** button, ***Figure 8, A***. on the **Client Information** window.

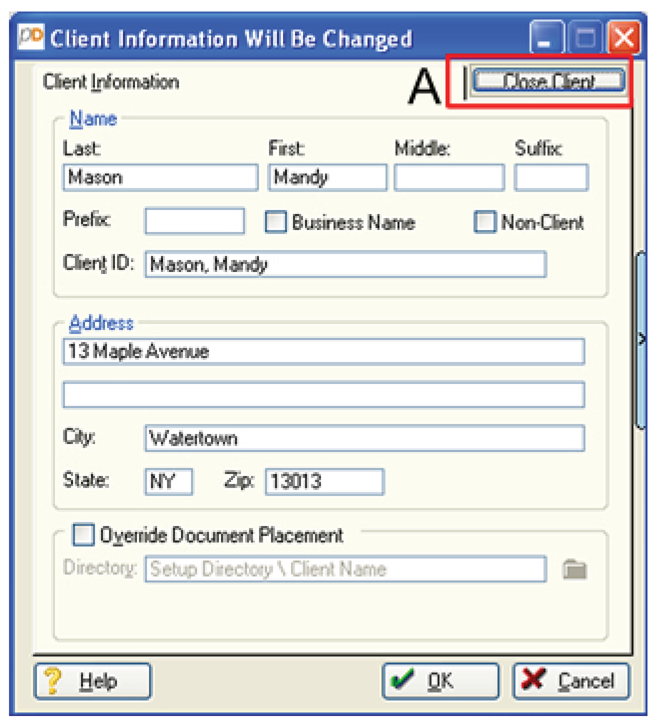

Figure 8 - Close Client

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The client has now been moved from active to closed status and will no longer show on the default list of clients.

B. Reactivate a Client

Just as it was a simple matter to close a client, it is also simple to reactivate that client.

a. Click the **Client/Case** icon as shown in *Figure 1*.

b. Click the drop-down arrow in the **Now Showing** field as shown in *Figure 2. A*.

c. The drop-down will display the categories of your clients. Click the radio button by **Closed Contacts**, *Figure 9. A*.

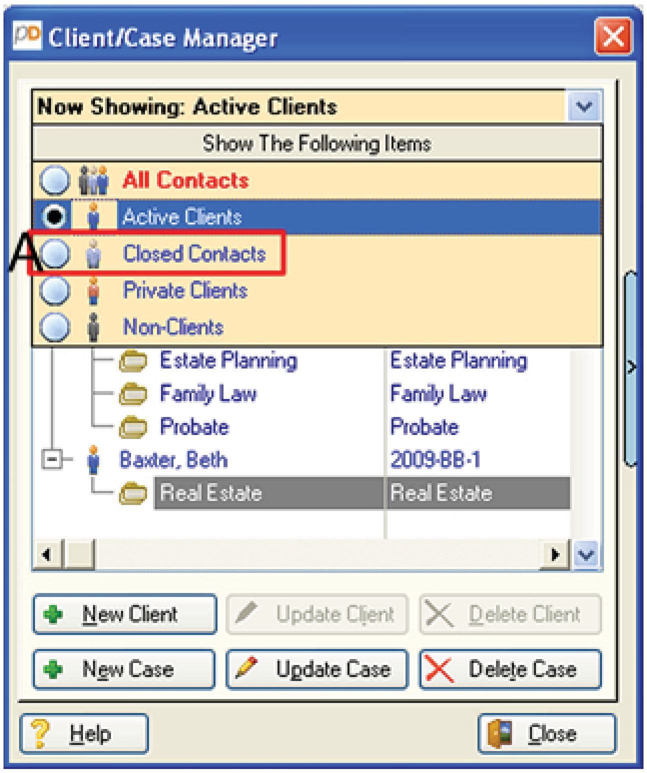

Figure 9 - Now Showing Closed Clients

The **Client/Case Manager** window **Now Showing** field will display your closed clients.

d. Highlight the client to be re-opened and click the **Update Client** button, *Figure 10. A*.

e. Click the **ReOpen Client** button on the **Client Information Will Be Changed** window, *Figure 11*, and **OK**.

f. You will be asked whether you want to reopen only the client and all cases. Make your selection and finish.

5. Additional Resources

For more help with editing case answers and revising finished documents, you can:

a. Use the training videos available at our web site at http://tinyurl.com/pd-basic-training

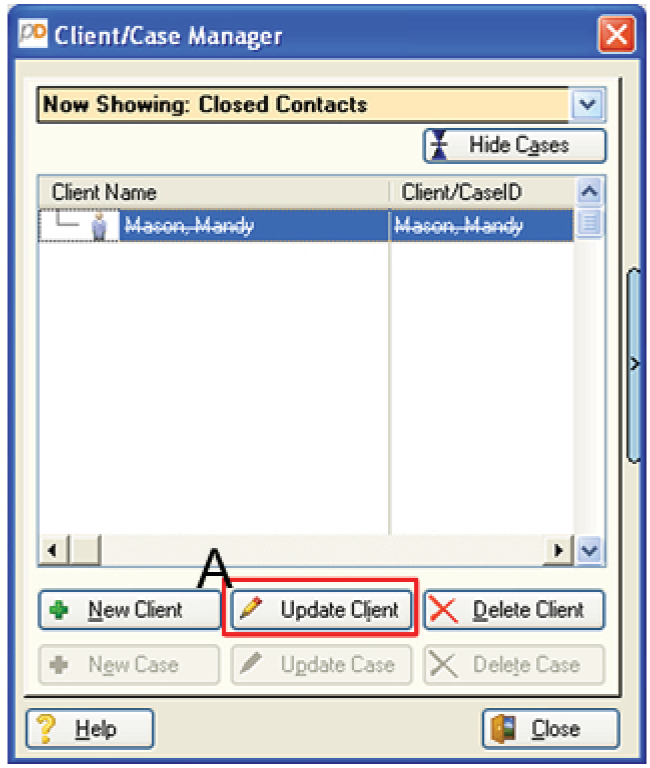

Figure 10 - Update Closed Client

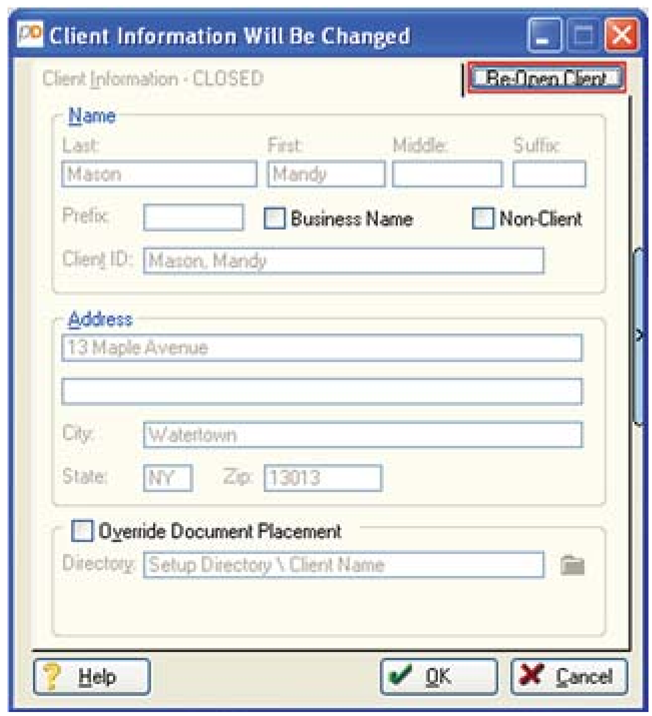

Figure 11 - Re-Open Client

b. Call our Technical Support team at 800 759-5418

c. Call our Training Team at 800-759-5418 for a personal training session on this topic