ProDoc Quick Reference Sheet

Using ProDoc

1. ASSEMBLING DOCUMENTS

1. Click the **Assemble Document** icon.
   - **a. Step 1 -** Click **Select Case**.
   - **b. Step 2 -** Click **Select forms**.
     - i. Choose the desired volume.
     - ii. Select the form(s) for assembly. Click **OK**.
   - c. Check the box, **Review prior answers**, if you would like to review the questions you have previously answered.
   - **d. Step 3** - Confirm the directory in which to save your completed document(s).
   - **e. Step 4** - Choose the appropriate **Default answer set** (if applicable).
2. Click the **Start Assembling** button.

2. MANAGING CLIENT AND CASE INFORMATION

A. Using Client/Case Manager

1. Click the **Client/Case Manager** icon.
2. To add or modify client information, click on **New Client**, **Update Client**, or **Delete Client** at the bottom of the window.
3. Enter, modify or delete client information as required. If entering or modifying information, click **OK**. If deleting information, click **Yes** or **No**.
4. To add or modify case information, click on **New Case**, **Update Case**, or **Delete Case**.
5. Enter, modify or delete case information as required. If entering or modifying information, click **OK**. If deleting information, click **Yes** or **No**.

B. Printing Case Data Sheets

1. Click **Print►Case Data Sheet**.
2. Click **Select Case**. Double-click the desired case, or click it and click **Select Case**.
3. Click the **Print Preview** box to deselect it if no print preview is desired. Click **Print**.
4. Click **OK** on the **Report Destination** window.
5. If previewing, click the printer icon to print the **Case Data Sheet**.

3. MANAGING DOCUMENTS

A. Opening a document from Client & Cases Document Manager

1. Click the **Document Manager** icon.
2. To view documents, click on the client's name and case description. Assembled documents for that case will appear in the **Title** box to the right.
3. Highlight the document and click **Open File** or double-click the document title. It opens in your word processor or a PDF reader.

B. Adding documents to a client's file in Client & Cases Document Manager

1. Click the **Document Manager** icon.
2. Click the client's name and case. Case documents are displayed in the **Title** box.
3. Click on the **Windows Explorer** button.
4. Resize the screens so that **Windows Explorer** is to the left of the list of documents in **Document Manager**, and you are viewing the programs side by side.
5. In **Windows Explorer**, browse to the document you would like to add to **Document Manager**.
6. Drag the file into the **Title** box.
7. The document will be moved into the client's folder and added to the list of documents for that client's case.
8. Open the document by double-clicking its title.

4. SETUP – OPTIMIZING PRODOC

A. Setting Default Answers

1. Click **Customize►Default Answers►Global Questions**.
2. Press the letter ***P*** on your keyboard to scroll down to the law firm information questions.
3. Answer questions **P0001-P0028** and **P0190-P0198**. These questions will ask for information specific to your law firm and attorney.
4. To open a question, double-click the question, or click it and click **Update Default Answer**.
5. Answer the question and click **OK** to save the answer as a default.
6. The answer will now show up every time that question is

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asked during document assembly.

B. Setting Default Answers during document assembly

1. During document assembly, answer a question by entering or selecting the answer.
2. Click the **Set as Default Answer** or **Default** button.
3. Confirm the default answer by clicking the Yes button.
4. Next time you assemble a document, the default answer or selection appears as the answer.

5. CREATING AND USING A FORM SET

1. Click **Customize▶Form Sets**.
2. Select the volume containing the forms you want to use and click **OK**.
3. Click **New Set**, enter a name for the form set, and click OK.
4. Click **Update Forms**. Select the forms to be included in the form set.
5. Click **Close**.
6. Next time you assemble documents and the **Select Forms** window appears, select the **Volume**, switch to the **Form Set** tab and highlight the form set.
7. You can click **Set up form sets** to clear or add forms you need for the assembly session, then click **Close**.
8. Click **OK** to return to the **Starting Document Assembly** window.

6. QUICKTEXT

A. CREATING AND MODIFYING QUICKTEXT

1. Click **Customize▶QuickText**. Click New.
2. Enter a name for the **QuickText**.
3. You may assign a **HotKey** (optional) to insert the **QuickText** by clicking a key or combination of keys (e.g. Ctrl + A) on your keyboard.
4. Choose **Text** or **Date** to create the **QuickText** as text or today's date.
5. Type in the text you want or choose the date format for your **QuickText**. Click **OK**.
6. To modify existing **QuickText**, click **Customize▶ QuickText**. Click **Update**. Edit the text or date format.

B. USING QUICKTEXT

To complete a text field, press the hot key assigned to your **QuickText** or click the **QuickText** button and select your entry. ProDoc will paste the information in the field.

7. EDITING CASE ANSWERS

1. Click **Clients & Cases▶Case Answers**.
2. Double-click the case to edit answers for, or click the case and click **Select Case**.
3. Highlight the question to update and click **View/Edit Answer.**
4. Change the answer. Click **OK.**
5. To delete an answer, highlight the question to delete, and click **Delete Answer**.
6. Click on the ***Close*** button and answer **Yes** to save changes.

8. REASSEMBLING DOCUMENTS

1. Open the **Document Manager**.
2. Select the client and highlight the case.
3. Select the document that you want to reassemble.
4. Click the **Reassemble** button.
5. Choose whether to overwrite the existing document or to create a new one.
6. If you've already edited case answers, uncheck the **Do you want to review your previous answers?** checkbox.
7. Press the **OK** button to start reassembling your document.

9. CHANGING THE DEFAULT FORMAT FOR DOCUMENTS

1. Click **Customize▶Document Formatting**.
2. Select **Global**, a **Volume**, or specific document(s) using the tree or Find Text button.
3. Click **Update Settings**.
4. Select the desired font **Name and Size**, **Margins**, **Line Spacing,** and/or **Justification**.
5. Click **OK**.

10. CHANGING THE DEFAULT LOCATION OF SAVED DOCUMENTS

1. Click **Customize▶Options**.
2. Click the **Completed Documents** link.
3. In the **Folder** field, enter the drive and directory where you want to save your completed documents, (e.g. ***C:\Clients***).
4. Select the **Folder** name components title for your desired document saving scheme (e.g. ***Directory\Client Name***), and click OK.

11. CHANGING YOUR WORD PROCESSOR

1. Click **Customize▶Options**.
2. Click the **Word Processor** link.
3. Click the drop-down arrow to the right of the word processor box and choose your word processor.
4. If your word processor is not listed, click the green check mark in the box below and select it.
5. Use the **Browse** button to the right of the **Location of Word Processor** field to search for your word processors.
6. Enter the path from where your word processor launches (e.g., ***C:\OFFICE\WPWIN\WPWIN.EXE***)

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12. ADDITIONAL RESOURCES

A. Detailed Instructions on Numerous ProDoc Features

We provide more detailed instructions on how to use many of the above features. Click the following links to view the instructions for these and other ProDoc features:

1. Adding Supplemental Forms to ProDoc - **tinyurl.com/pd-suppforms**
2. Certified Mailer - **tinyurl.com/pd-cert-mailer**
3. Creating Custom Intake Forms - **tinyurl.com/pd-custom-intake**
4. Customizing Default Formatting - **tinyurl.com/pd-default-formatting**
5. Default Answer Sets - **tinyurl.com/pd-default-answers**
6. Editing Case Answers - **tinyurl.com/pd-edit-answers**
7. Finding Forms in ProDoc - **tinyurl.com/finding-pd-forms**
8. Form Sets - **tinyurl.com/pd-form-sets**
9. Modifying ProDoc Master Form Templates - **tinyurl.com/pd-modify-templates**
10. Quick Text - **tinyurl.com/pd-quick-text**
11. Printing Case Data Sheets - **tinyurl.com/pd-case-data**
12. Printing Forms Lists -**tinyurl.com/pd-forms-lists**
13. Using Clients and Cases - **tinyurl.com/pd-clients-cases**

B. Self-Running ProDoc Training Videos

We also provide self-running videos demonstrating many of the above features at: **tinyurl.com/pd-basic-training**

C. ProDoc Manuals

You can download a ProDoc manual at: **tinyurl.com/pd-manuals**

13. GETTING ASSISTANCE

Call our ProDoc Technical Support team at 800-759-5418, option 3. To schedule a free training session or to contact your trainer, call 800-759-5418, option 4.