ProDoc Quick Reference Sheet

SOS Practice Manager

1. MANAGING CONTACT INFORMATION

1. Click the **Practice Manager** icon.
2. To add, modify, or remove contact information, click **New Contact**, or highlight a client and case and click **Update** or **Delete**.
3. Enter, update, or delete contact information as required.
4. If entering or modifying information, click **OK**.
5. If deleting information click **Yes** or **No**.

2. MANAGING CASE INFORMATION

1. Click the **Practice Manager** icon.
2. To add, modify, or remove case information, click **New Case**, **Update**, or **Delete**.
3. Enter, update, or delete case information as required.
4. If entering or modifying information, click **OK**.
5. If deleting information click **Yes** or **No**.

3. MANAGING DOCUMENTS

A. Viewing a Contact's Document Lists

1. Click the **Practice Manager** icon.
2. Highlight the contact whose documents you will be managing.
3. Click on the **Docs** tab. Any documents that have been created for the contact will show up on the document list. Documents created for your client's/contact's cases will not appear on this list; see step 4.
4. If the contact is a client, highlight the related case. Any documents that have been created for the contact's highlighted case will show up on the document list that appears under the **Docs** tab.

B. Opening Documents in Practice Manager

1. Click the **Practice Manager** icon.
2. Highlight the contact whose documents you will be opening. Click on the desired case, if applicable.
3. Click on the **Docs** tab. Any documents that have been created for the contact will show up on the document list.
4. Highlight a document on the document list.
5. Click the **Open** icon.

4. APPOINTMENTS, NOTES, AND TO DO ITEMS

1. Click the **Practice Manager** icon.
2. Highlight the contact related to the **Appointment**, **Note** or **To Do** Item.
3. If the contact is a client and the appointment, note or To Do relates to a case, highlight the related case.
4. Click on the tab entitled **Appts**, ***Notes,*** or **To Do**.
5. To add, modify or delete **Appointments**, **Notes,** or **To Do** tasks, click **New**, **Update,** or **Delete**.
6. Enter, update or delete **Appointment**, **Note,** or **To Do** as required.
7. If entering or modifying information, click **OK**.
8. If deleting information click **Yes** or **No**.

5. CATEGORIES

A. Creating, Updating, or Deleting Categories

1. Click **Setup►System manager►Categories**.
2. Click the tab for one of the categories:
   a. Contact categories
   b. Case associated contacts
3. To add, modify, or remove a Category, click **New**, **Update,** or **Delete**.
4. Enter, update, or delete the category information as required.
5. If entering or modifying information, click **OK**.
6. If deleting information click **Yes** or **No**.

6. CONTACT CATEGORIES

A. Associating Contacts with Contact Categories

1. Click the **Practice Manager** icon.
2. Highlight a contact and click **Update**.
3. Click the **Categories** tab.
4. Click **Select** under the **Categories** box.
5. Choose the contact categories in which you want this contact to appear.
6. Click **OK**.

B. Using Contact Category Tabs

1. Click the **Practice Manager** icon.
2. The **Contact Category** tabs are on the left side of the **Contact Name** box.
3. Clicking on the tabs will display the list of contacts that have been associated with the chosen category.

7. ASSOCIATING CONTACTS

A. Associating Contacts with Cases

1. Click the **Practice Manager** icon.
2. Highlight the client and/or case for which you will be associating contacts.

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3. Click the **Association**s tab.
4. Click **Update Associations**.
5. Highlight the contact's name under **Contact Name**, and click on the **Associations** tab, which you would like to associate with the contact (e.g., witnesses).
6. Click **Add**.
7. Click **Close**.

B. Locating Case Associated Contacts

1. Click the **Practice Manager** icon.
2. Highlight the client and case for which you will be associating contacts.
3. Click on the **Associations** tab.
4. The list of contacts that you have associated with this case appears.

8. CALENDARS

A. Setting Defaults on Your Calendars

1. Click **Setup▶Personal preferences**.
2. Choose the **Calendars** tab.
3. In the box entitled **Beginning time for daily calendar**, use the up and down arrows to select the time you want your calendar to reflect as the start of your work day.
4. In the box entitled **End of working time for daily calendar**, use the up and down arrows to select the time you want your calendar to reflect as the end of your work day.
5. In the box entitled **Calendar displayed by default for**, click on the drop-down arrow and choose the person for whom you want the calendar's appointments to default.
6. In the box entitled **To Do displayed by default for**, click on the drop-down arrow and choose the person for whom you want the calendar's **To Do** list to appear as a default.
7. Click **OK**.

9. CERTIFIED MAILER

A. Addressing certified mail labels

To address certified mail labels for contacts:

1. Click **Tools▶Certified mailer**.
2. The **Certified mailer** box appears. The field entitled **Contacts Receiving Certified Mail** will list the names of the contacts for which you choose to create certified mail labels.
3. Click **Select** a contact to choose the primary contact.
4. The **Select the Contact You Want** box appears. Highlight the contact to which you are sending certified mail.
5. Click **Select Contact**. The contact you chose should appear in the **Contacts Receiving Certified Mail** list.
6. To add additional contacts, follow steps 3 through 5 for each contact that you want to add.

B. To address certified mail labels for contact/case associations:

1. Click the **Certified mailer** icon.
2. The **Certified mailer** box appears. The field labeled **Contacts Receiving Certified Mail** will list the names of the contacts for which you choose to create certified mail labels.
3. Click the **Add contact/case associations** button.
4. The **Select a Contact or Case** box appears.
   a. If you highlight a contact and click **Select**, all of the contacts associated with the highlighted contact appear in the **Contacts Receiving Certified Mail** field.
   b. If you highlight a contact and then highlight one of the contact's cases and click **Select**, all of the contacts associated with the highlighted case appear in the **Contacts Receiving Certified Mail** field.

10. TRANSFERRING CONTACTS

1. Begin the **HotSync** process on your Palm™ device in your normal fashion.
2. When the **HotSync** is complete, the **Merge and Copy Palm™ and SOS Contacts** screen appears.
3. You may select one, several or all of the contacts to copy at a time. **Closed Contacts** are not copied.
   a. Highlight the contact(s) that you want to copy and click the corresponding **Copy to SOS** or the **Copy to Palm** button(s); or
   b. Click the **Copy All** button, and then click **Process**.
4. To copy and process all of your contacts at the same time, click the **Accept All** button. This button serves as a shortcut.
5. Press the **HotSync** a second time to complete the Palm to SOS transfer.

11. MERGING CONTACTS

1. Begin the **HotSync** process on your Palm™ device in your normal fashion.
2. When the **HotSync** is complete, the **Merge and Copy Palm™ and SOS Contacts** screen appears.
3. Highlight the contact that you want to merge in both windows. Do not place a check mark beside the contact's name.
4. Click the **Merge an existing Palm and SOS contact** button.
5. Click **Yes** on the **Merge Records** screen.
6. Click **Process**.
7. Click **OK** on the **Next Synchronization** screen.
8. Press the **HotSync** a second time to complete the merge.

12. 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.