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.
      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
   A. Do relates to a case, highlight the related case.
   1. Click on the tab entitled Appts, Notes, or To Do.
   2. To add, modify or delete Appointments, Notes, or To Do tasks, click New, Update, or Delete.
   3. Enter, update or delete Appointment, Note, or To Do as required.
   4. If entering or modifying information, click OK.
   5. 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.
3. Click the **Associations** 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.

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**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.