ProDoc Tech Tip
Using the ProDoc Certified Mailer Feature

The ProDoc Certified Mailer feature makes it easy to print labels for certified mail. You only need a printer and certified mailer forms. You can select contacts from your database to include in the mailing and add contacts who are not in your database. The program does the rest.

The standard method of producing these labels by rolling them into a typewriter and manually typing the required information is very costly in terms of time and labor. It can easily consume 15 minutes of time by you or a staff member—time better spent on something else.

Of course, you could also avoid manual typing by setting up a format in your word processor…but then you would lose the advantage of accuracy from automatically transferring data you've already entered into ProDoc to the Certified Mailer forms.

Finally, maybe you hand write your green cards to save the typewriter hassle. ProDoc software's typed versions look much more professional and that positively reflects on your image as a lawyer and the image of your firm as well.

1. How to Use the Certified Mailer Feature

You can quickly choose clients from your database, or you can add contacts that are not in your database.

Before you can use this feature, you will need to purchase certified mail shipping labels.

To produce certified mailer labels, perform the following steps:

A. On the ProDoc toolbar, click the **Cert. Mailer** button as shown in *Figure 1.*

Figure 1 - Click on the Certified Mailer Button

B. The Certified Mailer window opens as shown in *Figure 2.* Enter the necessary information using the following guidelines:

   a.   Enter the subject of the certified Mailer (A).

   b.   View contacts you enter as recipients in the recipients field (B).

   c.   Add any new contacts that are not in the ProDoc database (C). When you click this button, the **Adding a New Record** window opens and enables you to a new recipient to the recipient list. You can also set any fees for mailing to the recipient.
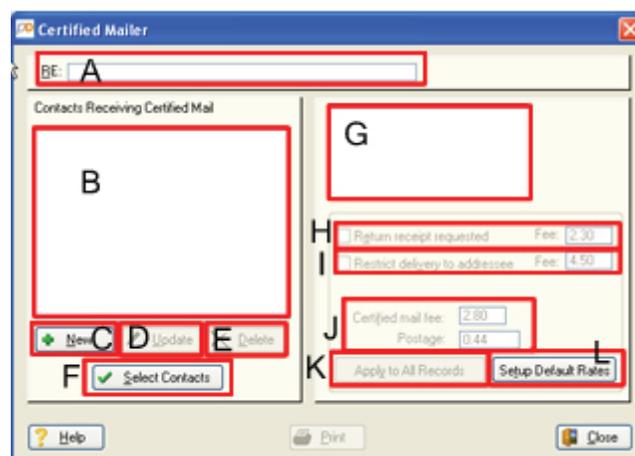
Figure 2 - The Certified Mailer Window

   d.   Select existing contacts from the ProDoc database (*F*). When you click this button, the **Select Contacts** window opens and enables you to select as many existing case contacts as you wish for the recipient list.

   e.   Update the information for any recipients showing on the recipients list (*B*) using the **Update** button *D*). After a recipient is displayed in the recipients window, click on it and the **Update** button will be available for your use.

   f.   Similar to the **Update** button (*D*), the **Delete** button (*E*) is only available to you after clicking on a recipient. It is for deleteing any recipients from the recipients list.

   g.   When a recipient is highlighted in the contact window (B), the address for that contact will appear in the address field (*G*).

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h. Check the box (**H**) if you want a return receipt (RRR) for the mail sent to the highlighted recipient. The fee should be current but you can update it if necessary.

i. Check this box (**L**) if you want to restrict delivery (RDA) to the named recipient. The fee should be current but you can update it if necessary.

j. The fees area (**J**) shows the current default rate for the postage fees. ProDoc automatically updates those fees for you as soon as we are able to after a postage rate increase but you should double check these fees as well as the fees in (**I**) and (**J**) above immediately after a postal rate increase.

k. If you want the settings in (**H**), (**I**), and (**J**) to apply to all of the recipients click the **Apply to All Records** button (**K**). This will prevent you from having to apply the settings to each recipient individually.

l. If you find that the postage rates have not been updated yet after a postal rate increase, or you customarily send packages over one ounce that require a postage rate above the minimum, or that you always require a return receipt or restrict delivery to the addressee; as examples: the **Setup Default Rates** button (**L**) enables you to set those as your defaults for future certified mailings.

C. Review your selections. You can change options, addresses and amounts by highlighting the contact and making the desired changes on the right side of the window. You can also do this in a separate window by highlighting the name and clicking Update. Click **OK** to return to the *Certified Mailer window*.

D. When you are done, your completed Certified Mailer window will look approximately like *Figure 3*.

E. Click **Print**. You'll see a printer report destination window. Choose your printer and any other preferences and then click **OK**.

F. A warning screen will remind you to insert the appropriate number of Certified Mail labels into your printer. Do this and then click **OK**.

That's all there is to it. Our Certified Mailer feature gives you a fast and easy way to prepare and send professional looking certified mail!
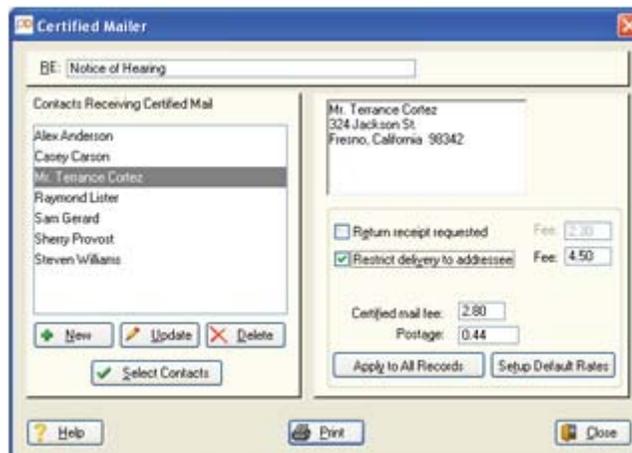

Figure 3 - The Completed Certified Mailer Window

2. Obtaining the Certified Mailer Forms

You can purchase the needed forms from the post office or any major office supply store. You can order large quantities of these forms at a reduced cost from Walz Postal Solutions—Walz Form 35663 works well with the Certified Mailer feature (**www.walzgroup.com/laser_forms.htm**).

You can also order smaller quantities of the Certified Mailer forms from Thomson West. Call 800-759-5418 and select the option for the Sales Department.