ProDoc Tech Tips

Creating and Using Clients and Cases in ProDoc

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.

And, if you do not select ***Review prior answers*** during your document assembly sessions you will skip questions for data that it has previously saved.

So, open ProDoc, click on the **Client/Case** icon as shown in Figure 1 and let's get started.

Figure 1

Adding a New Client

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

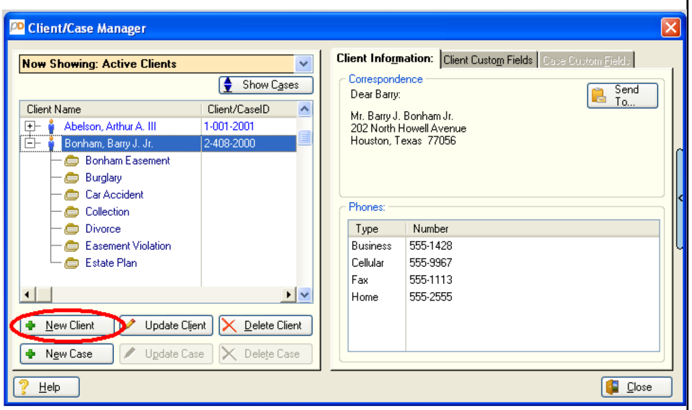

Figure 2, Clients/Case Manager

Enter your first client by clicking on the **+ New Client** button as shown on Figure 2. The **Client Will be Added window** opens as shown in Figure 3, except that it will be blank.

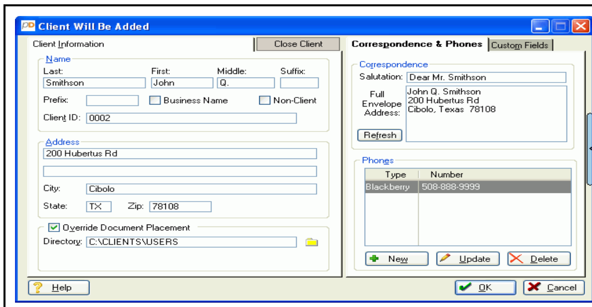

Figure 3, Client Will Be Added Window

Expand/contract the window by clicking the blue arrow button on the right side window border. Expanding the window reveals three tabs on this window as shown in Figure 3: **Client information**, **Correspondence & Phones** and **Custom Fields.**

When expanded, the window will display the highlighted client's correspondence and phone information.
Fill in each field of the Client information tab as shown in Figure 3. Leave the **Override Document Placement** box unchecked to use the default directory you specified in document settings.

Only check the Override box to specify a different directory for this particular client.

After completing the information on the left, click the **Refresh** button on the right to copy envelope addresses from the left to the right.

At the right side, add a **Salutation** for correspondence.

Enter phone information on the right side by clicking the **New** button. In the window that appears, select the type of phone and enter the number in XXX-XXX-XXXX format.

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

Adding a New Case

If your firm uses **Case IDs**, enter the appropriate one here, as shown in Figure 4. The ID must either be blank or be a unique set of characters for each case.

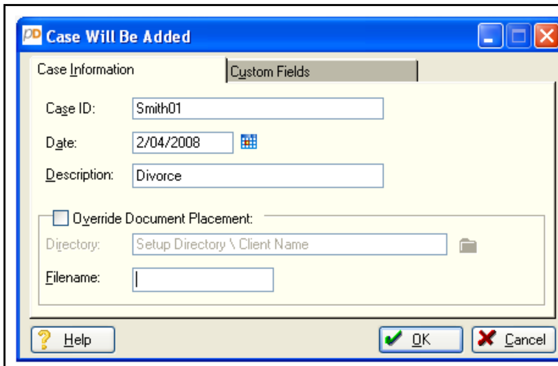

Figure 4, Adding a Case

The **Date** field will default to today's date. You can change the date by typing it in or clicking on the date selection button next to the field.

Enter a unique name or phrase in the **Description** field to help identify this case. It can be any word, number or combinations. Common uses are short descriptions such as "Divorce" or "Estate Planning".

Only click the **Override Document Placement and Directory** box if you want 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.

Filename - This field will not be visible if you chose in setup to have ProDoc automatically "use the form 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.

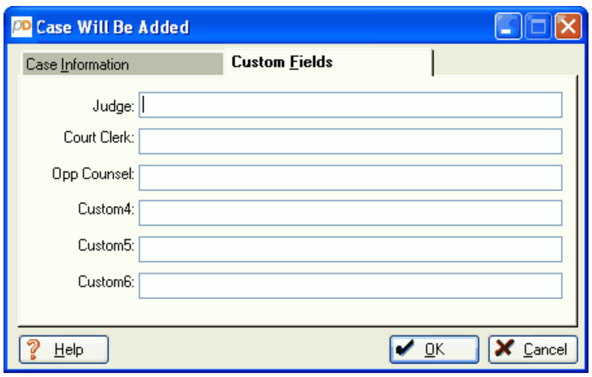

Figure 5, Enter Case Custom Fields Window

Click the Custom Fields tab if you have set these up earlier and wish to enter appropriate information. A window similar to Figure 5 will appear. You will find instructions for setting up your Custom Fields labels in Chapter 3 of your ProDoc manual.

In this example, Case Custom Fields were set up which included Judge, Court Clerk, and Opposing Counsel.

Type in the information as needed, then click the **OK** button to return to the **Client/Case Manager** window.

Using a Client and Case to Assemble a Document

Click on the **Assemble** icon to open the **Starting a Document Assembly** window as shown in Figure 6.

The **Select a Case** window lists existing clients and all cases for the clients. Here, you can select cases; see and modify related client/case data; and create new clients and cases. Figure 7 depicts the **Select a Case** window.

Initially you will see only the list of clients with a **(+)** in the box to the left of each client name. Clicking on the **(+)** changes it to a **(–)** and reveals the cases under each client.

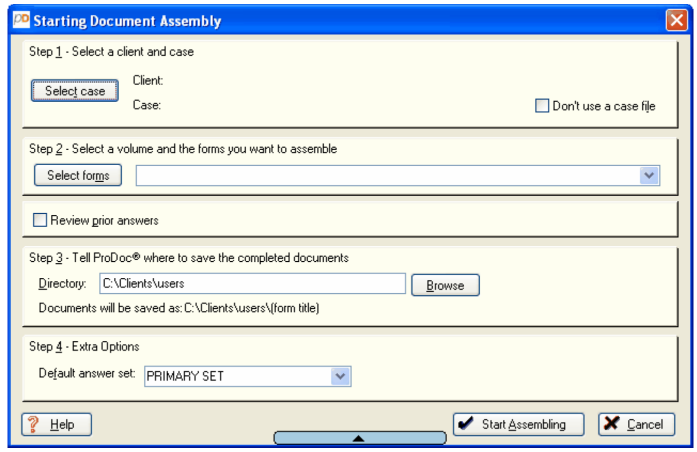

Figure 6, Assemble a Document

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. You'll be returned to the **Starting Document Assembly** window (Figure 6), which displays the selected client and case.

Now, 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.

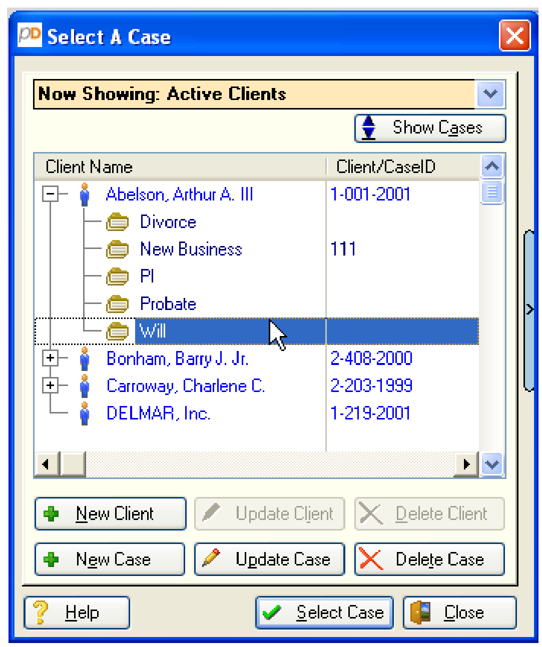

Figure 7, Select a Case Window

If you have questions about these procedures, or about creating custom fields in the Case Will Be Added window, call our Technical Support team at 800-759-5418, option #5.