

How to Configure and Use Form Sets (Texas version)

Why Use Form Sets?

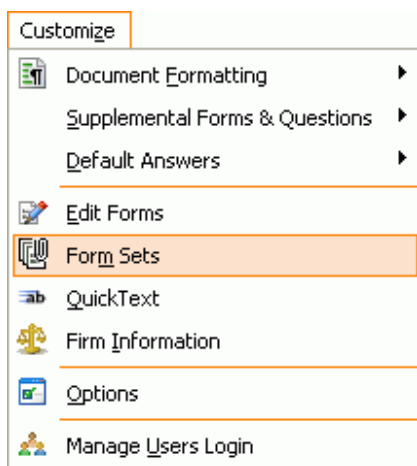
The ability to build, save and use Form Sets is one of the best time savers that ProDoc offers to you. In virtually every law practice, many different clients will need the same group of forms for similar cases. Form Sets enable you to prepare these documents quickly and easily.

Specifically, form sets provide these benefits for your practice:

- Simplifies the form selection process. Rather than selecting forms individually, you select the stored form set when you assemble documents. Click the **Form sets** tab to choose the set you wish to assemble. If you want to omit one or more forms from the set for a particular assembly session, you can remove the form(s) for only that session.
- Eliminates duplicate questions and answers in the assembly process. Any questions asked for different forms in the set will only be asked and answered once. Common answers are used for each form in the set when you assemble the forms.
- Allows you to include your own supplemental forms (see the [Creating Supplemental Forms](#) tutorial) in a set to meet any special needs you may have.
- Allows you to quickly choose and print a variety of worksheet question lists taken from every form in the form set (**Print**→**Worksheets**→**Select Forms** button). This provides you a standard case input worksheet for clients who need the documents.

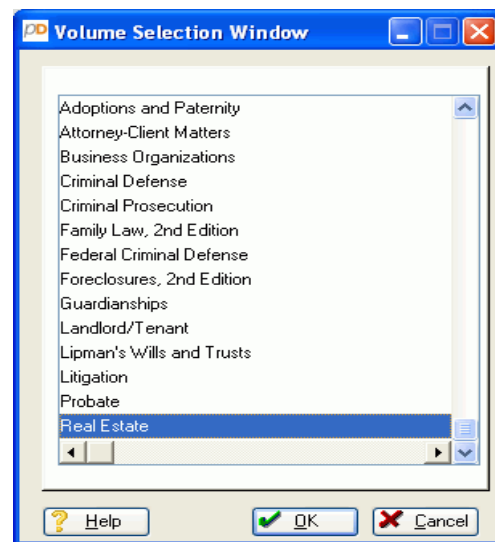
Creating a Form Set

At the ProDoc main menu, click **Customize**→**Form Sets**.



The **Volume Selection Window** appears.

Select a volume from which to build your form set. You can either double-click the title, or click a title (for example, Real Estate) and click **OK**.



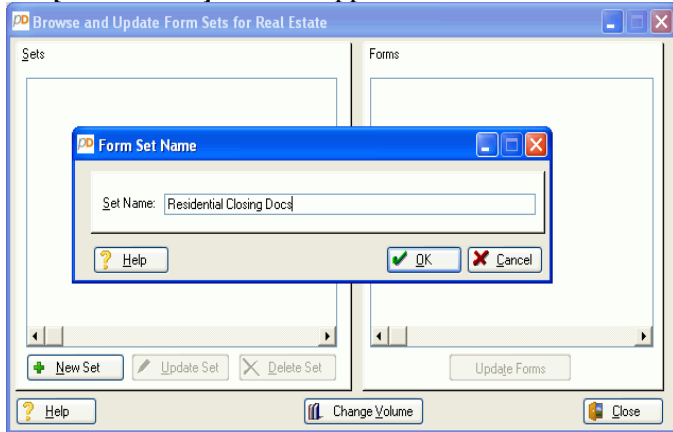
The **Browse and Update Form Sets for Real Estate** window appears. Click the **New Set** button. The **Form Set Name** window appears.

Name your form set (for example, Residential Closing Docs) and click **OK**. The Form Set name appears on the **Browse and Update Form Sets** window.

Click the **Update Forms** button. The **Selecting Forms**

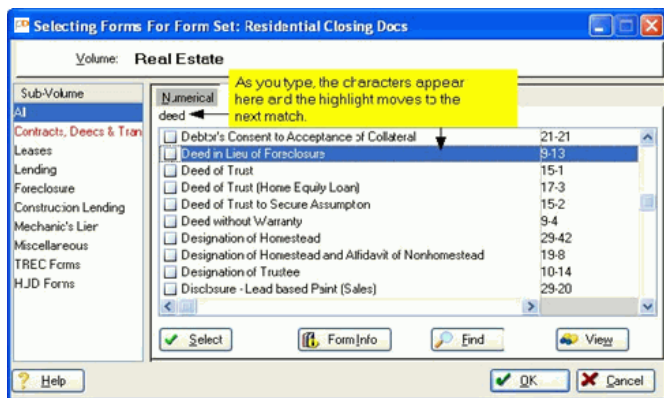
ProDoc Tech Tips

for [name of set] window appears.



At this point, you can use the keyboard search feature (described in the following paragraph) or the **Find a Form** window.

Click the **Alphabetical** tab at the top of the window. The list of forms is now ordered alphabetically.



Find a form by typing the first few letters of the form title you need. For instance, to easily find the form titled “Deed of Trust” type “Deed.”

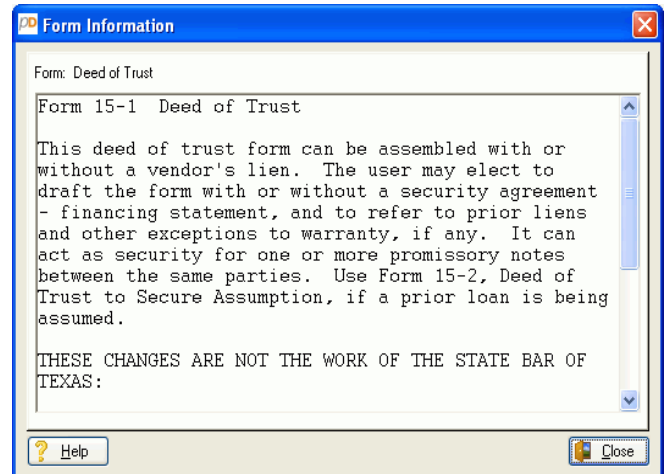
Select the form by clicking the box to the left of the form title. After clicking the box, your search letters are discarded, and you can repeat the process to find and select another form.

If you need to clear a mistake, press the backspace key. The highlight will back up through the selections as you remove letters.

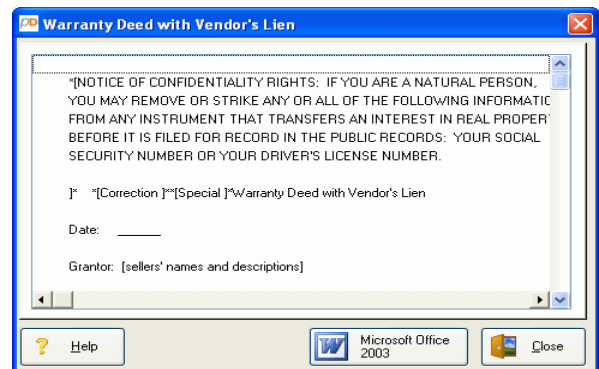
While searching and selecting forms, you can use the buttons on the window to interact with the highlighted form.

The **Select** button either selects the form or clears the selection check box.

The **Form Information** window displays more about the form, including the purpose of the form. This lets you determine if the form meets your needs.



View opens forms in a window. You can view the form’s layout, including placeholders which are filled with your answers when the form is assembled.



After you have selected the forms you want to include in your set, click **OK** on the **Selecting Forms for Form Set** window. The selected forms appear on the **Browse and Update Form Sets** window.

Click the **Close** button to finish creating your form set.

ProDoc will remember your form set designations for each volume.

To create new form sets, or to change or delete your form sets, follow the same basic procedures as outlined above.