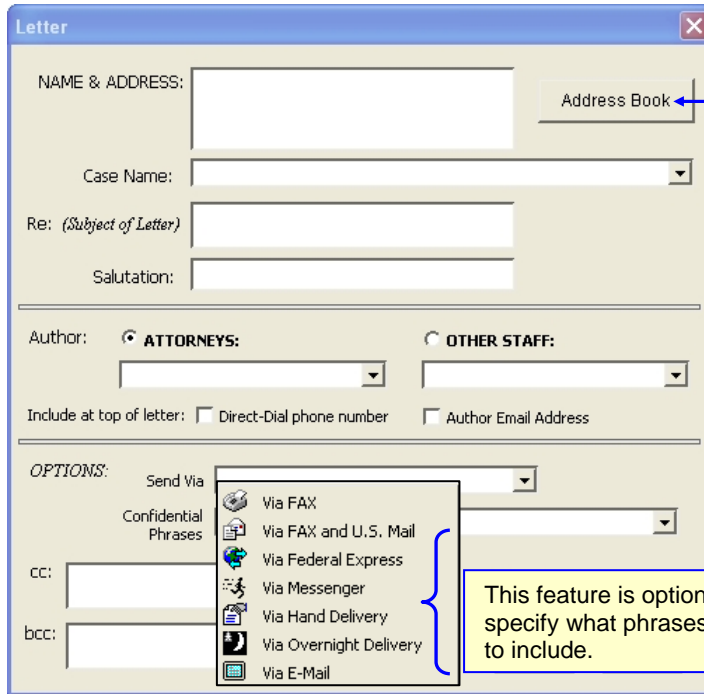


# WORD AUTOMATION TEMPLATES – FEATURE GUIDE

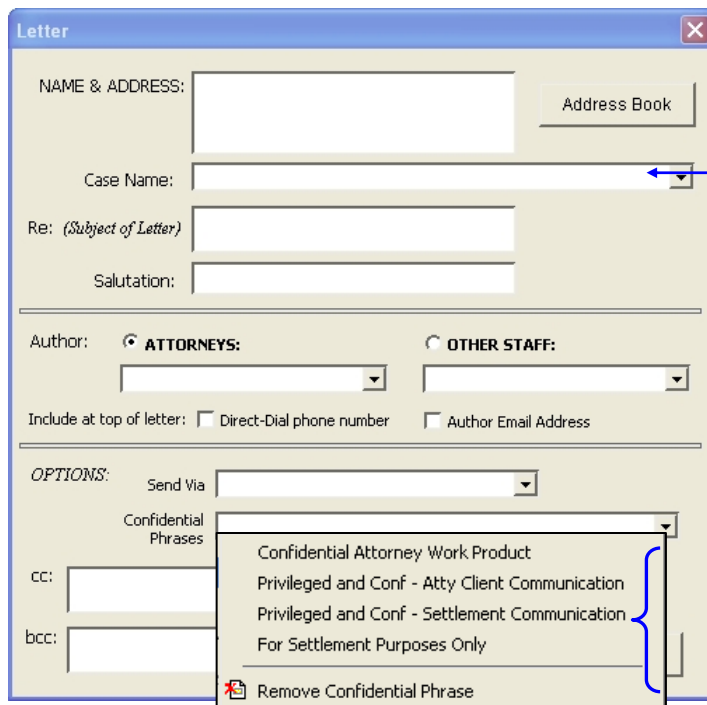
## LETTER Template - Standard Options to include in dialog box:



Displays Outlook Contacts, automatically inserts selected name & address.

Options for separate author lists.  
Options to include author direct dial, email address in letterhead area on page 1.

This feature is optional. You specify what phrases, if any, to include.

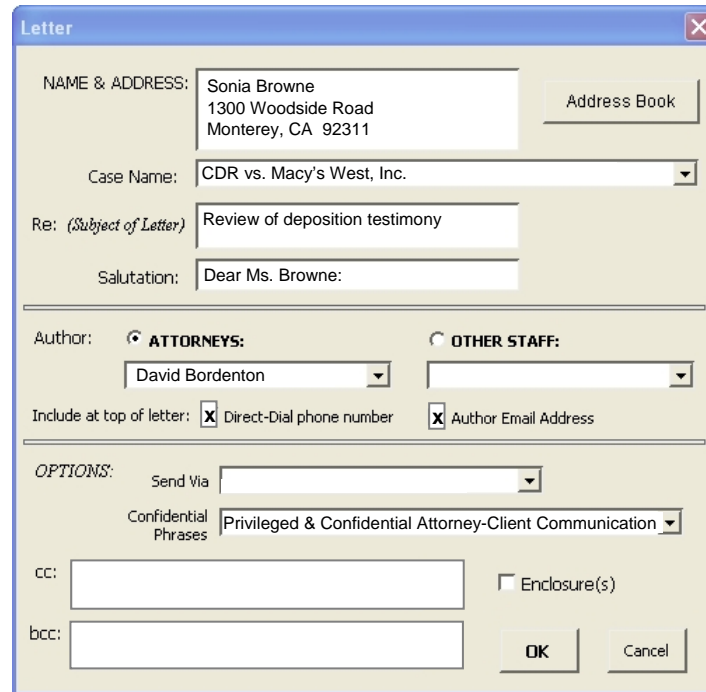


This feature is optional. You can create a list of case names, or *Re: Line blocks* (i.e. for insurance defense), to be inserted quickly and accurately.

This feature is optional. You specify what phrases, if any, to include.

## LETTER Template – Example:

This example shows information entered into fields in the Letter dialog box.



The 'Letter' dialog box is shown with the following information entered:

- NAME & ADDRESS:** Sonia Browne, 1300 Woodside Road, Monterey, CA 92311. An 'Address Book' button is visible to the right.
- Case Name:** CDR vs. Macy's West, Inc.
- Re: (Subject of Letter):** Review of deposition testimony
- Salutation:** Dear Ms. Browne:
- Author:**  **ATTORNEYS:** David Bordenon;  **OTHER STAFF:** (empty)
- Include at top of letter:**  Direct-Dial phone number;  Author Email Address
- OPTIONS:** Send Via (empty); Confidential Phrases: Privileged & Confidential Attorney-Client Communication
- cc:** (empty);  Enclosure(s)
- bcc:** (empty)
- Buttons:** OK, Cancel

Clicking the **OK button** creates a letter document, as shown on the next page.



## FAX COVER Template:

RECIPIENT NAME:  [Look Up Contacts](#)

Company:

Fax Number:

Case Name:

Number of Pages:  BILLING:

Comments:

OK Cancel

Optional: Case Name, billing, etc. You specify which items you want on Fax Cover page.

Displays Outlook Contacts, inserts selected name, company and Fax number.

**FACSIMILE COVER SHEET**

DATE: November 5, 2005

TO: Jereny Anderson	FAX NUMBER: 925-352-3322
FROM: Susan Peters	PAGES (w/ cover): 3
RE: Victor Printing vs. National Supply Company, et al.	
Our File: 02-555-2555	

COMMENTS: Please call me after you review

Letterhead for your office to be inserted at top of page.

You specify the format and placement of items.

**ORIGINAL DOCUMENT(S) WILL:**

*Optional:*

- |                                               |                                                             |
|-----------------------------------------------|-------------------------------------------------------------|
| <input type="checkbox"/> BE SENT BY MAIL      | <input type="checkbox"/> BE SENT BY FEDEX/OVERNIGHT COURIER |
| <input type="checkbox"/> BE SENT BY MESSENGER | <input type="checkbox"/> BE SENT BY E-MAIL                  |
| <input type="checkbox"/> NOT BE SENT          |                                                             |

As shown in the example below, text is shown at the bottom of each page of the Fax cover sheet. The text can be modified to meet the requirements of your office.

The information contained in this facsimile message is information protected by attorney-client and/or the attorney/work product privileges. It is intended only for the use of the individual named above, and the privileges are not waived by virtue of this having been sent by facsimile. If the person actually receiving this facsimile or any other reader of the facsimile is not the named recipient or the employee or agent responsible to deliver it to the named recipient, any use, dissemination, distribution, or copying of the communication is strictly prohibited. If you have received this communication in error, please immediately notify us by telephone and return the original message to us at the above address via the U.S. Postal Service.

**Fax Toolbar**

Privileged and Confidential

Privileged and Confidential Attorney-Client Communication

Privileged and Confidential/Settlement Communication

Do Not Disclose

Confidential Attorney Work Product

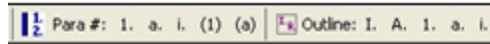
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REMOVE - No Phrase

◆ FAX Tools: Add another Recipient \*Confidentiality Phrases Confidential Notice in Footer [On/Off]

## Options for Extra Customization:

Automatic Numbering



Automatic Paragraph Numbering    Outlining  
Multi-Level / up to level 5

## TEMPLATES CUSTOMIZATION CHECKLIST

Standard Customization Items		Comments
Integration with Outlook Contacts / Address Book	Click 1 button to access contact information in Outlook – your own personal contacts folder, or a public (shared) folder on Exchange server	
Format and Position of typical elements [based on your sample documents] See examples on page 4	Letterhead, Date, Re: Line (subject) Greeting (i.e. <i>Dear Mr. Jones</i> ) Body Text paragraphs (Block style? First line indent?) Author signature <ul style="list-style-type: none"> <li>• Closing phrase (i.e. <i>Sincerely</i>)</li> <li>• Author name (Uppercase Name? Job title?)</li> </ul> Author details at top/bottom of Page 1 <ul style="list-style-type: none"> <li>• Email address / Direct dial phone / Job Title</li> </ul> Header for following pages: <ul style="list-style-type: none"> <li>• Recipient Name</li> <li>• Date from Page 1</li> <li>• Page Number</li> </ul>	
Format & Position of delivery phrases ... See examples on page 4	Method of Delivery (i.e. <i>Via Messenger</i> ) Confidential, Privileged (i.e. <i>Personal and Confidential</i> ) Disclaimer (“small print” for Fax Cover page in case of incorrect transmission))	
Format Toolbar	Simple format tools for any editor (see page 5)	
Update Names & Company data	Easy method to update typical data used by templates: <ul style="list-style-type: none"> <li>• Company name/address/phone &amp; fax</li> <li>• Author names (including title, if any, email address, direct dial phone, author initials)</li> </ul>	

## Printing Options:

Sample Document *	Letterhead?	Yes/No	Comments
Letter	Are <u>final letters</u> printed onto special letterhead stationery? - or ... is letterhead printed onto plain or bond paper directly from a laser printer?		
Fax Cover	Is letterhead printed directly from laser printer in your office? Same letterhead as for letter documents?		
Envelope	Special printed stationery w/ return address? - or ... is return address printed onto plain envelopes from laser printer in your office?		
Memo	Include letterhead, or company name? - or ... create simple memo format?		

\* Sample documents can be sent via email, or printed copies can be sent via regular or express mail.

Requests for Extra Customization		Yes/No	Comments
Multiple Recipients	If more than 2 recipients in a letter, side-by-side address blocks		
Set Default Author	Letter signature, <i>From</i> field in Fax Cover and Memo templates		
Printing	Add commands to toolbar, such as: <ul style="list-style-type: none"> <li>• Add/Remove Letterhead</li> <li>• Print as Draft/Final (print to specific paper tray)</li> </ul>		
Insert Form Text	Add commands to insert "boilerplate" text – language often used in letters & memos		
Special Styles	Besides typical styles (i.e. body text), other styles to display on toolbar?		
Auto-Numbering See page 7	Buttons for Outline numbering / multi-level paragraph numbering		
Lock Headers or Footers	User cannot click into or change text or format in header or footer.		
Automatically Update Letterhead Ask for examples, or an online demonstration!	When any Letter or Fax Cover document is opened in Microsoft Word, letterhead on page 1 is automatically made current – by replacing all text in the letterhead area with the current "master" letterhead		
Multiple Departments / Multiple Offices	Separate settings/options for each?		

Integration with other Contact Management programs	Insert Contact data (name, address, phone/fax) into documents from program: <ul style="list-style-type: none"> <li>• ACT!</li> <li>• Amicus</li> <li>• ProLaw</li> <li>• PracticeMaster</li> <li>• Interwoven (InterAction)</li> </ul>		
Integration with DMS (Document Management system)	Data from any DMS profile fields can be “pushed” into any Word document. <ul style="list-style-type: none"> <li>• Worldox, iManage (WorkSite)</li> </ul>		

<b>Settings for Microsoft Word: Adjust and Standardize</b> 1-time command for each user	Yes/No	Comments
<b>TOOLS menu / OPTIONS</b>  <b>TOOLS menu / AUTOCORRECT OPTION</b>		<p>There are over 100 settings in this area – should they be the same for all editors in your organization?</p> <p>Document editing and final printing will be more efficient and reliable if <u>standard</u> settings are established in Microsoft Word for all users.</p>

**Contact us for further information on Word Automation Templates:**

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**San Diego, CA 92103**  
**619.819.8224**  
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