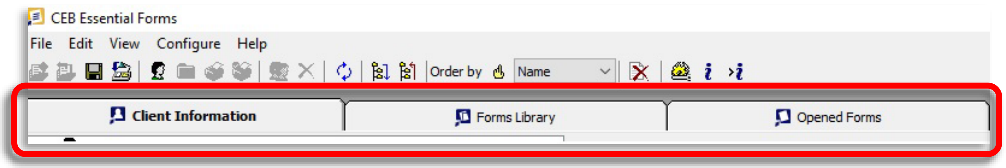
Thank you for choosing

Essential Forms™

Quick Start Guide

Now that you've downloaded the latest Essential Forms™ software, let's get it working for you. You'll soon see why thousands of California attorneys use and trust us to save them valuable time and improve the quality of their forms.

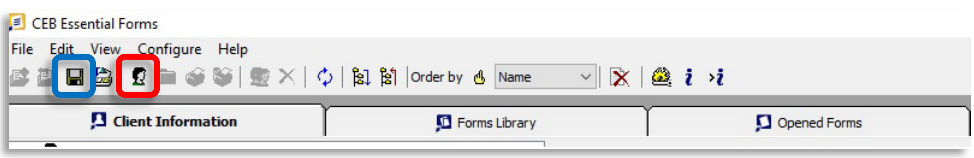
This guide is designed to be a quick reference for getting started with Essential Forms basics. For more detailed instructions, images, and information, please see the current User's Manual.



When you first start Essential Forms, you'll see four tabs near the top of your screen. The first *three* are shown above. These three tabs are your key to using this software.

- **Client Information Tab**: This is where your client information and completed forms are saved.
- **Forms Library Tab**: This is where all the *blank* forms are stored, and where you start when creating a new form for your client.
- **Opened Forms Tab**: This is the "workspace" where all your currently-open forms are held.

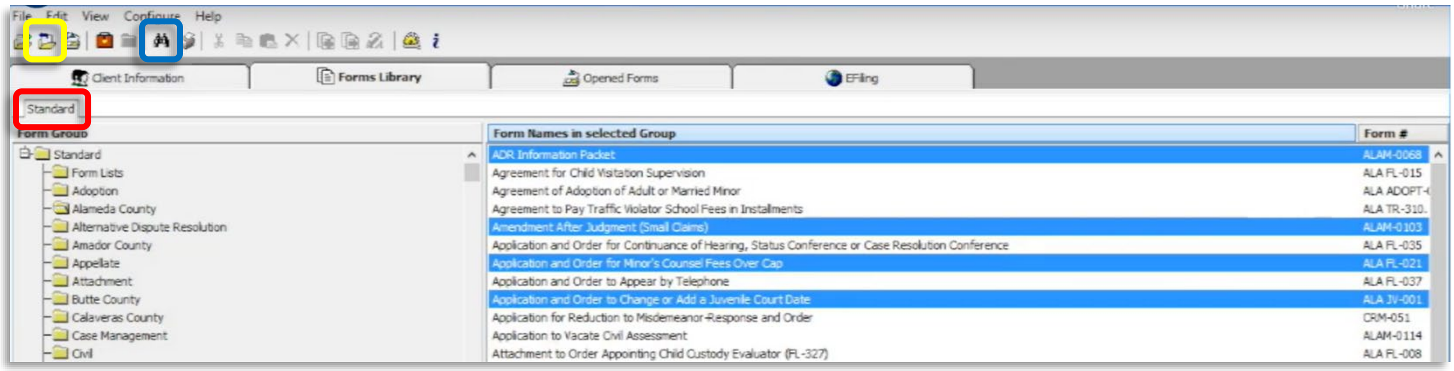
Adding a new client:



Once you've entered the information here, it will be auto-populated into each form you open for this client.

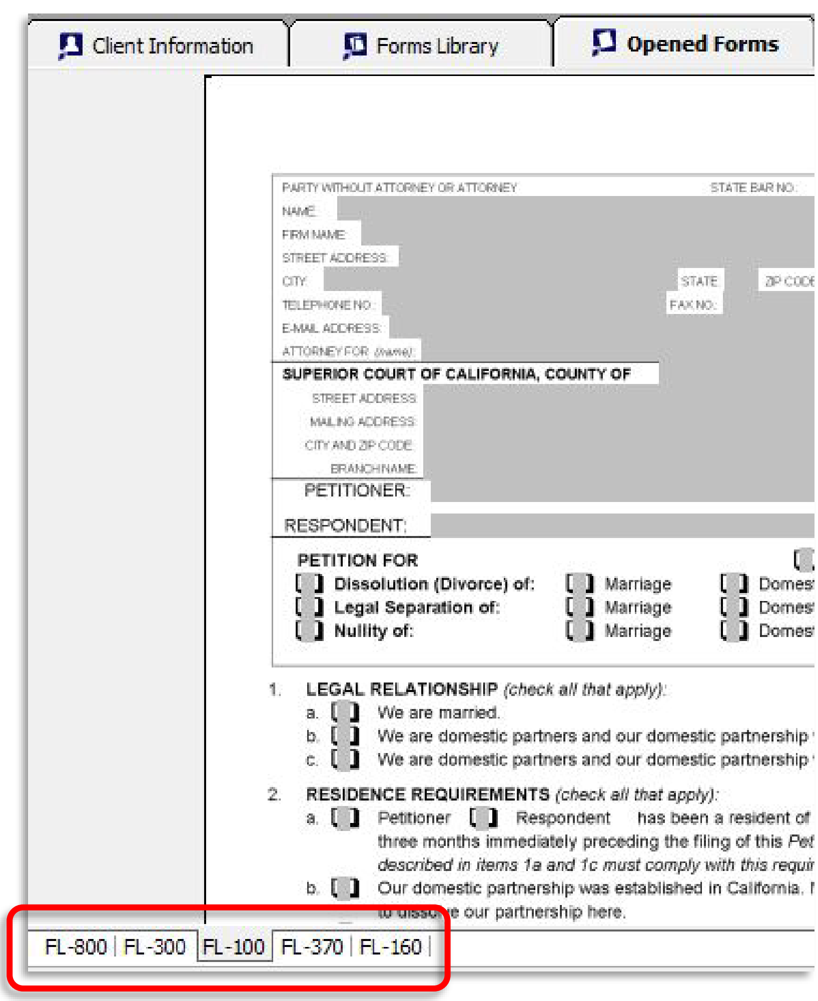
1. Click on the **Client Information** tab.
2. Click on the **New Client** icon on the tool bar (see above in red). A small window called **Client Database Assistant** will appear.
3. Fill in the **Client Name** and **Matter Name**. The matter name can be anything that will help you distinguish this from other matters for that client. The default matter name is "New Matter" if nothing is entered. Click **OK**.
4. Another dialogue box will appear, asking you to **Select Filing Court**. From the pull-down list, select a court that has been previously entered, or click the **Add/Edit stored courts** button to add another court.
5. Once a court has been chosen, you will see the **Select Filing Attorney** screen. From the pull-down list, select the attorney that has previously been entered, or click **Add/Edit stored attorneys** button to add another attorney.
6. Once the attorney has been added, you will see the new client folder appear under the Client Information tab on the left side. Clicking the arrow next to the client name will expand the folder to show all matters for this client.
7. Now click on the Matter Name you would like to work on. The **Client Profile** data-entry screen will appear. Enter the client's information once here to auto-populate the forms you create for this client matter. There are several tabs located along the bottom of this screen. Always complete the **General** tab, then choose which other tabs to complete based on what is relevant to the case.
8. Save the client profile by clicking the **Save** icon (see above in blue).
9. To create an additional new matter for this client, simply select the client name, then select **New Matter** from the **File** menu.

Selecting and Opening a Blank Form:



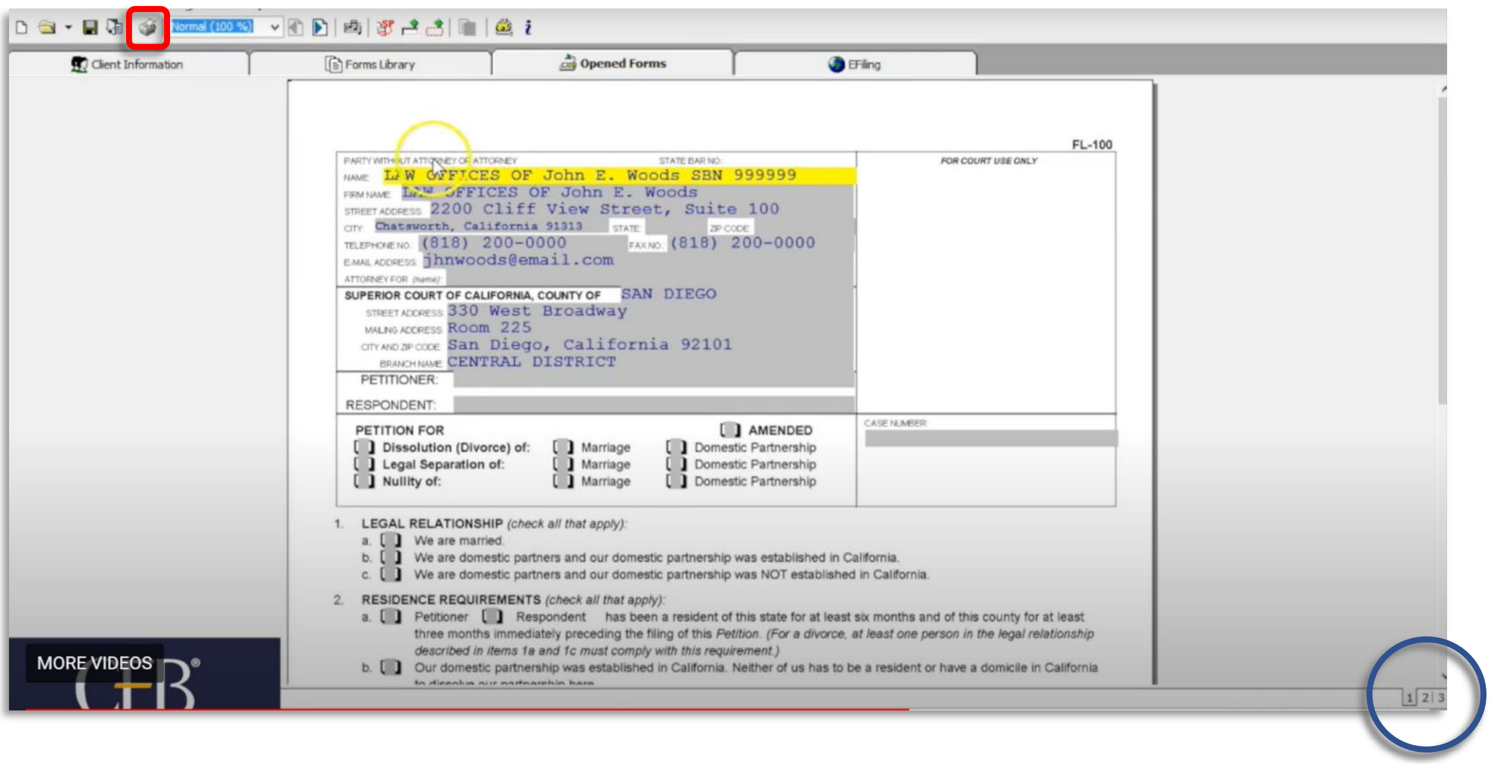
Once you have added a new client and created a client profile, you'll want to start adding needed forms.

1. Click on the **Forms Library** tab. Just under this tab, you will now see one smaller tab called **Standard** (see above in red).
2. Under the **Standard** tab, you will find several **Form Groups**. These are *blank* forms arranged alphabetically in groups designated by the Judicial Council.
3. Click on the form group folder you are interested in. The list of forms contained in that group will appear on the right. To search for a specific form, click the **Search** icon (see above in blue), select how you would like to search (by form group, form name, or form number), enter your search terms, and click **Search**.
4. To open a form, double click the form name. You will automatically be taken to the **Open Forms** tab, and your form will be ready to be filled. To open multiple forms at once, hold down the <Ctrl> key while selecting the forms you would like to open, then click the **Open Selected Forms** icon (see above in yellow).
5. Once in the **Open Forms** tab, each open form will have its own tab on the bottom left of the screen.



Filling in Blank Forms

1. In the **Client Information** tab, click the arrow next to the client you want, then click the matter you would like to work on for that client. This tells the program which client and matter data will be used to populate the form(s) and where the form(s) will be saved.
2. Select the blank form you want to work on for this matter by clicking on the **Forms Library** tab and finding the form you need as outlined above. By first selecting the client and matter, then finding the form in the library, the form will be populated from the client/matter profile when it opens in the **Open Forms** tab.
3. Fill in the remaining fields. If this is a multi-page form, the page number will be indicated on small tabs in the bottom right corner of the screen, as shown here in blue. Use these tabs to navigate the document.



4. To print a form, simply click the **Print** icon (shown above in red).
5. Save the completed form by clicking the **Save** icon. If you add a descriptive comment for the form, a "music note" icon will appear next to the form name in the Matter folder to indicate that there is a note associated with the form.
6. Saved forms will be found under the **client name** and **matter name** in the **Client Information** tab. Clicking the arrow next to the matter name will expand the folder to show all saved forms in that matter. To open a saved form, double-click the name of the form you would like to open.

Renaming Clients, Matters, and Saved Forms

1. Find the client, matter, or form you would like to rename, right click the icon next to the item, then click "Rename" in the menu.
2. The selected client, matter, or form name field will become *active* (highlighted). Simply start typing the desired updated name. Hit the Enter key on your keyboard to save the changes.