

Perfect Form

Quick Guide – July, 2009

The Best Place to Begin

View Demo Movie

What to click
Click Help, then Demo Movie

Matters (a matter is an estate, domestic relations case, guardianship, etc.)

What to click

View list of existing matters

Matter List Tab

Sort list of existing matters

Matter List Tab, click at the top of a column (sort by Modification date to bring current matters to the top)

Start a new, blank matter

Matter List Tab, click New

Type in Standard Info (basic info that will automatically flow to all the forms)

Matter Info Tab, double-click Standard Information on left, double-click type of case

Create new matters that already have some Standard Information filled in (e.g. the attorney info)

Start a new, blank matter. If it is an estate, name it 1 estate template (the number 1 puts it at top of list if you sort). Type in std. info and save. For each new matter, make a copy of this matter and rename it.

Rename matter

Matter List Tab, single-click matter, click Rename

Delete matter

Matter List Tab, single-click matter, click Delete

Make a copy of the matter

Matter List Tab, single-click matter, click Copy

Make a read-only copy of matter

Matter List Tab, single-click matter, click Version

Ways to cut down on typing the same thing over and over

What to click

Standard information (name of atty, etc. – appears on forms automatically)

Matter Info Tab, double-click std info on left, double-click type of info

Master Input List (type in the items that will to appear on the inventory, accounts and tax returns)

Matter Info Tab, double-click Master Input Section on left, double-click Master Input List

Type in Quick Names (frequently-used short text, such as addresses, that can be brought into forms with a keystroke)

Matter Info Tab, double-click Quick Names on left

Type in Quick Descriptions (frequently-used lengthy text descriptions that can be brought into forms with a keystroke)

Matter Info Tab, double-click Quick Descriptions on left

Ways to cut down on typing the same thing over and over (continued)

What to click

Reports (you can sort the Master Input List items here, making it easier to find things. Click at the top of a column to sort. Double click on an item to work on it.)

Matter Info Tab, double-click Master Input Section on left, double-click Reports

Getting to the right form

What to click

Navigate between different groups of forms

Forms Tab, click on folders on left to expand until form menu appears on right (can also use arrow keys and Enter key to expand folders and move around)

Work on form

Forms Tab, navigate on left side until form menu appears on right, double-click on form (or use arrow keys to move to that line and press Enter)

Search for form (by searching for words that you think will appear in the title of the form)

Forms Tab, click Search

When working on a Form

What to click

Move around the form

Arrow keys or click on field

Next field; Previous field

Enter or Tab; Shift-tab

Create new field

Right-click outside of a field, click Create Field, hold down left mouse button and drag

Undo

Press Esc before leaving field

Spell check

Click Spell Check

Save

Click Save

Print

See Printing section, other side

Save form to PDF file

See Printing section, other side

Start a new blank copy of a form you a working on

Click New Copy

Go to previous copy (if any)

Click Previous Copy

Go to next copy (if any)

Click Next Copy

Delete current form (clears this copy of the form to default values)

Click Delete

Make degree symbol °

Press Ctrl and letter O

Change text formatting

Right-click in field, click on desired formatting option

(Continued on next page)

<i>When working on a form (continued)</i>	<i>What to click</i>
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Reset red fields (return all std. info or calculated fields on form to default values)	Click Reset Red Fields
Reset one red field	Right-click in red field, click Reset Red Field
Use Quick Names (bring frequently-used short text into current form)	F9 or right-click in the field you want to bring Quick Names into, click on Quick Names
Use Quick Descriptions (bring lengthy text description into current form)	F10 or right-click in the field you want to bring Quick Description into, click on Quick Descriptions
Edit paste buffer (the paste buffer is where text is put after it is “copied” in any Windows program, and from where it is “pasted.” You can modify it here before you paste it.)	Right-click in any field, click on Edit Paste Buffer
Copy a series of fields to the paste buffer	Right-click in field, click Multiple field actions, click copy
Paste a series of fields from paste buffer	Right-click in field, click Multiple field actions, click paste
Export Quick Names to another program	F10 or right-click in any field and select Quick Names, click Copy to Paste Buffer, go to other program, paste

<i>Print or save to PDF</i>	<i>What to click</i>
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Print while working on form	Click Print or Save PDF, Print
Print more than one form at a time	Forms tab, navigate to a group of forms, click boxes in front of forms to be printed, click Print All Checked
Print preview	Bring form onto the screen, click Print or Save PDF , then Print Preview or Save PDF
Print from print preview	While print preview is displayed, click Print
Save form to PDF file	While print preview is displayed, click Save to PDF (saves a PDF file that you can email)
Print forms that have been saved as PDF files	Outside PerfectForm, use “My Computer” to locate the PDF file, double-click on it, click print. If this doesn’t work, you need to download Adobe Acrobat (a free program): http://www.adobe.com/products/acrobat/readstep2.html
Print envelopes automatically	Add addresses to Quick Names (see Matter Info), click Forms tab, click Utilities (on left), double-click form

<i>Options</i>	<i>What to click</i>
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Form Zoom (make forms bigger or smaller on the screen for easier viewing)	Options Tab, Move Form Zoom Pointer
Set or change current data directory (users who have the same data directory can work on the same matters)	Options Tab, click Choose a Directory, click Browse
Backup matters (to restore on this or another computer)	Options Tab, click Backup
Restore matters (that were backed up)	Options Tab, click Restore
Move matters to a different data directory (if matters are in a single data directory all users can work on them)	(a) backup the matters, (b) change current data directory to the one you want to move them to, (c) restore matters
Unlock matter (if a user turns off the computer while a matter is open, others on the network will continue to see that matter as currently in use, and they will not be able to work on it)	Options Tab, click Unlock (or the original user can re-open the matter and then exit normally)

<i>Updating</i>	<i>What to click</i>
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Adjust automatic checking for updates	Options Tab, Update Interval
Update forms	You can wait for the pop-up window to tell you that new forms are available, or click on the Forms or Options Tab, then on Update
Restrict updating	Options Tab, click Enable / Disable Password for Update
Browser Update (for users who cannot update the normal way because of a firewall or because the computer has no internet access)	Go to our web site: www.perfform.com and click on Download, Browser Update

<i>Misc.</i>	<i>What to click</i>
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Sort menu items and listings	Click top of menu column
Automatically generate Ohio tax forms 12 and 14	Go to Master Input List (see Matter Info), for each stock, click Add Item, click 12/14 box, enter company name
Automatically generate Notices of Probate of Will	Add addresses to Quick Names (see Matter Info), click Forms tab, navigate to Std Forms, Decedent’s Estate, Part 1, Form 2.2 (uses qu. names)