QuickDocsPro.com™
Fast Start Tips & FAQ

Version 1.0

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Use this information to help you get started using this handy software in little or no time.

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1. Before You Begin – Assumptions & Tips

Assumptions:

You have Microsoft Word 2003 or earlier installed on your computer and you know how to do a copy and paste function in Word.

Tips:

1. Review the online help. This can be accessed by clicking the Help tab in the program.
2. Be careful when you are modifying your master documents.

Pre-Installed Documents

QuickDocsPro comes pre-loaded with the following master documents

- Assignment of Beneficial Interest
- Authorization to Release
- Bill of Sale
- Insurance Notification
- Land Trust Agreement
- Lender Escrow Letter
- Lender Notification
- Notice of Trust
- Power of Attorney
- Property and Utilities Info
- Purchase Agreement
- Quit Claim Deed (Seller1 to Seller2)
- Seller Disclosure
- Testimonial
- Transaction Disclosure Affidavit
- Warranty Deed To Trustee

These documents may not be valid for your state. Please consult your attorney. You can modify these documents however you need to.

You have the ability to add documents to the program.

Creating New Document for Import

Your originals documents that you will import into *QuickDocsPro* ™ are referred to as the **"Source Documents".**

1. We recommend that you preserve your original "source" documents maintaining a master set of your original documents before starting any work.

2. Next, create a new folder and name it *QuickDocsProSourceDocs*.

3. Put a copy of your "source" documents in this new folder. We will edit these documents to include the desired merge fields.

4. Copy the List of Merge Fields document into the *QuickDocsProSourceDocs* directory. There is a master document that contains a list of all of the merge fields that you can include in your documents. This word file is called List of Merge Fields. The file is located in the following directory:

   DriveName:\Program Files\QuickDocs Pro\QuickDocsPro1.0\Read Me

   Note: DriveName is usually C: **,** however If you installed the software on another drive (eg: D) then use that drive name.

   Below is an example of a merged document ready to be imported into QuickDocsPro. **Note: The key is to make sure you include the << and >> when you copy the fields from the List of Merge Fields document. This is important and will prevent import errors.**

   ### Examples of Merged Data

   ### Authorization to Release Information

   Date: «TodayOfferDate»

   To: «Lender1Name»

   Address: «Lender1Address»

   Attention: «Lender1ContactPerson»

   Phone: «Lender1ContactPhone» Ext: «Lender1ContactPhoneExtension» **Fax:** «Lender1ContactFax»

   Account Number: «Lender1AccountNumber»

   Property Address: «PropertyAddressStreet» «PropertyAddressCity», «PropertyAddressState» «PropertyAddressZip»

Prepare to Test: Follow these Basic Steps:

We recommend that you complete the entire process **one document** at a time. One document may have several merged fields so start with a small document.

The process basically involves copying one merged field from the *Merged Fields* file and pasting that field into the **"source"** document.

This way, if a mistake is made during the process of pasting the merged fields into the "source" documents, the user can quickly identify the location of the error.

1. Open the **"source"** document
2. Open the *Merged Fields* documents.
3. Begin pasting all of the applicable or desired merged fields into the **"source"** document.
4. Now it's time to import that one document into QuickDocsPro ™ and test.

Importing Documents into QuickDocsPro ™

1. Open QuickDocsPro ™

2. Click **"Master Documents"** in the main menu

3. Click **"Import Documents"**

4. Click **"Browse"** to find your "source" files that you want to import from the appropriate directory.

5. Double click on the document name or highlight the name and click **"Open"**.

6. Type in the desired number of copies to be printed for that document.

7. Then type the number for the desired printing order for that document.

8. Click **"Import"**.

9. The "File Imported" message will be displayed, Click **"OK"**.

10. Click **"Properties"** in the main menu

11. Click **"Property List"**

12. Make sure **"Sample Property"** is highlighted.
    Note: You can edit the **"Sample Property"** data if you want to customize it more for your needs.

13. Click **"Generate Documents"**

14. Once your documents have been generated successfully, click **"Edit Document"** to view the imported documents.
    Note: Use this opportunity to see what fields are broken. Watch for any error messages during the import. This information can be used during any necessary trouble shooting.

15. Once the documents have been generated and you're satisfied that all the merge fields are in place, print out a set of sample documents with sample data.

Importing Blank Documents into QuickDocsPro ™

1. Rename the word file by adding the word "_Blank" to the end of the file name

2. Then click the icon for Master Documents

3. Click "Import Blank Documents"

Editing The Imported Documents – Not The Preferred Method

After successfully importing the "source" documents, the **new** files are saved in the "**Master Documents**" folder on the hard drive.

Warning:
We do not recommend editing or formatting these "**Master Documents**" master documents. If you decide to do this, then AFTER making changes to these "**Master Documents**" it will be necessary to re-generate the documents and click
"**Edit Document**" again to view any changes that were made.

Editing the "Source" Documents – Preferred Method

If you need to edit/modify your documents, we recommend doing this in your original "source" documents. Then you will need to re-import each updated document.

Formatting Your Documents

We recommend that you make all formatting changes (i.e. footers, font styles, page numbers) prior to importing the documents into *QuickDocsPro ™*.

If you made these changes in Word, then you will have to re-import your newly formatted document into *QuickDocsPro ™*.

2. Change the Default Company & Buyer Information

1. Under Settings, change the default company, trust and buyer information if needed.

3. Start a New Property File

1. Click on the main menu button named Properties

2. Click New Property; enter the property name using the exact following naming convention: *PStreetNumber Street Name* i.e. "P123 Easy Steetbi". This can not be changed so type slowly and accurately the first time.
    Note: You can only use "A to Z" to start a property name and "0 to 9".

3. Property Description – enter the type of house and any unique info about the property or situation of the seller. This can not be changed so type slowly and accurately the first time.

4. Begin populating the data in the various fields behind each tab. PLEASE pay close attention to the help at the bottom of the screen for each field. You MUST type in the data EXACTLY the way it is shown in the help. You should click Next as you complete the data for each tab or just click on the name of the tab at the top of the screen.

    Note: The "Trust Date" should be the same as "Date of Sale"

5. Click on Edit Property

6. Click Save and close the window

7. Click OK in the dialog box that reads "Property Details Successfully Saved"

8. Click on the Properties button

9. Click Property List

10. Click Generate Docs and you will see a message, "Please wait while QuickDocsPro is generating your documents. **Note:** anytime data is changed, you have to re-generate the merged documents.

11. Click OK in the dialog box that reads "Documents Generated Successfully"

12. Click Edit Documents to first view them before printing. The best one to view is the Property Info document.

13. Highlight the property that you want to print and click Edit. This will open the document in Word allowing you to review the merged info you added. If you change the document, it will NOT override the content in the master documents. The content will only be modified for this particular property.

14. Then click Cancel to close the Edit Property Document window.

15. To print, click Print Docs and change the Buffer time from 15 to 1 and click OK

16. Select the document you want to print. If you want to print a specific number of copies of that particular document, then scroll to the right and double click on the # of copies on that row and change the info.

17. Select the printer and click Print. You should see "Please wait, printing under process".
    Note: It may take 10 seconds to print.

18. Click OK in the dialog box stating "Documents are successfully printed"

19. Click Cancel to close the window

Printing ONE Blank Set of Documents

1. Click "**Master Documents**" in the main menu

2. Select the documents to print

3. Double click on the document you want to print and change the number of copies you want to print.

4. Change the Buffer time from 15 to 1.

   Note: Depending on your computer, printer, and network settings you may have to adjust the Buffer Time settings accordingly. Setting of 1 is for the fastest.

5. Click OK in dialog box that reads, "Documents are successfully printed"

Printing ALL Blank Documents

1. Click on Master Documents

2. Click Blank Documents List

3. Put a check mark in "Select All Documents" and Print All

4. If the master documents are changed, you will need to replace the appropriate blank copy with the updated master copy

4. Frequently Asked Questions (FAQs)

Can your organization modify my source documents with the merged fields for me?

Yes. This is a service billed by the hour. Contact our office for more information.

Does technical support come with the software package?

Yes. For the first 30 days.

Will I receive updates of the software for free?

Yes.