

The original All-in-One®
Software Suite for
Case and Financial Management

Front Office Product Sheet 

Document Assembly

Product Features

- Simply cut & paste merge codes from practice area specific master documents to create custom forms containing client, matter, party/contact, dates, case, etc.
- Easily find and select the correct forms by document type (letter, pleading, motion, etc.) or area of law
- Automate repetitive or mass emailing by using standard PerfectLaw® merge technology and field codes
- Select forms and merge without leaving your word processor

Firms are often faced with several challenges when trying to prepare legal documents. Information must be assembled from various sources such as contact records, scheduled events and other case information, and then analyzed in order to prepare a final document. Often the same information is typed over and over again into different forms related to the same matter resulting in lost time, increased costs, and delayed service to clients. With PerfectLaw®, users enter data once into the case management system. Then, with a simple click of a button, a user can effortlessly merge case information into custom or official forms.

Benefits

- Use All-in-One® software to prepare all your documents
- Eliminate the need to maintain official government forms, just download them from PerfectLaw®
- Eliminate the need to maintain separate case databases for merge data
- Reduce time spent typing and document formatting
- Minimize document production errors
- Eliminate the time wasted retrieving case data from multiple sources

Functions

- Merge case information from your matter database into official or custom forms with a click of a button
- Automatically save and profile assembled form documents in your All-in-One® Document Management System (DMS) under the correct matter
- Download official pdf forms from PerfectLaw®
- Create your own custom forms for Microsoft® Word®, Corel® WordPerfect® or Adobe® Acrobat®
- Export all data from merged pdf forms as xml and send the data to other applications

PERFECTLAW®
ALL-IN-ONE® SOFTWARE

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Synergy

- 3D workflow technology links forms to docket event for automated document production
- Document Assembly automatically creates time slips for billing
- With the PerfectLaw® search engine, you can easily locate merged documents

**BOND, DERHAM
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RICHARD A. CONNER
LAURA PETERSON

{ CREATEDATE \@ "MMMM d, yyyy" \} MERGEFORMAT }

{ mergefield r_def_fullname }
{ mergefield r_def_ADDRESS }

Re: { mergefield matter_name }
File No: { MERGEFIELD LSLITIG_CTCAS }

Dear { if { mergefield r_def_1_salutation } <> "" { mergefield r_def_fullname } }:

Please be advised that this firm has been retained by { MATTER_CLIENT_NAME }, to represent you in the cap by { mergefield R_PL_FULLNAME } for personal injury.

This firm has undertaken your defense and will file all documents on your behalf, including an answer to the apprised of the case status and any pertinent developments.

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January 3, 2003

Morton Fiske
1000 May West
Suite 400
Trainman, FL 32090

Re: United Insurance Corp.
Our File No.: 84779

Dear Mr. Fiske:

Please be advised that this firm has been retained to represent Meredith Hastings in connection with injuries sustained as a result of your negligent operation of a motor vehicle resulting in an automobile accident on or about 5/22/02.

If you have insurance, please provide us with your insurance information and immediately

Merge forms allow users to standardize firm documents by using merge fields. Then, documents containing client, matter, party, dates and case information can be easily created with a mouse click.

PERFECTLAW® ALL-IN-ONE® SOFTWARE

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