

Adding Documents to the Additional Documents Library

This procedure requires sophisticated knowledge of your word processing program and its merge functions. If you are not proficient with advanced formatting, merge codes, and merging data into your word processing software, consult the manual that came with your word processing software or any of the numerous books that are available which explain these functions.

To make sure that Best Case Technical Support staff are available to answer questions for Best Case customers about Best Case Bankruptcy, our staff cannot provide support for word processing products.

You can add letters or local forms to the Additional Documents Library for use with any of your client files. Data fields available include all information on the Voluntary Petition (including debtor's name, address, and social security number, attorney and firm name), names and address of all creditors in a case, and the name and address of any one creditor in a case. You can add a document based on an existing document in the Additional Documents Library, described below, or add a new document.

Adding a Document Based on an Existing Document in the Additional Documents Library

Using this procedure, you will start with an existing document in the Additional Documents Library, make changes, save the document with a different name, then index the document in the Additional Documents Library. This procedure is to be used when you want a document similar to one that already exists, and also want to save the one that is already there. (E.g. - You may have multiple form letters to clients or creditors that you would like to be able to print from the Additional Documents Library. This procedure saves you from inserting merge codes for each document.)

To add a document based on an existing document:

1. At the Forms and Schedules Menu, click on the Additional Documents tab at the top of the window.
2. Highlight the document that you want to base your document on and press [Ctrl]-[E].
3. If you have both Word and WordPerfect installed, you will be asked to choose which one you want to use. Note that the word processor used to create the document is the word processor you will be using to print this document in the future; if you create it in WordPerfect, you will not be able to merge it in Word. Make your selection then click **Edit ADL**.
4. The document will open in your word processing software.
5. Before making any changes, click on File in the main menu, then on Save As. Save the document using a different file name and the following guidelines:
 - a. If you are using **Microsoft Word**, you will need to save the document in the **BESTCASE\Adl_ms** directory. Give the document an **8-character** file name, (up to 8 characters) and the extension **wfm**. For example, a document created in Word might be named **CRLETTER.WFM**. Note that in Word 7, 97 and Word 2000, you will need to put quotes around the file name to save so that Word doesn't automatically add the "doc" extension.
 - b. If you are using **WordPerfect**, you will need to save the document in the **BESTCASE\Adl_wp** directory. Give the document an **8 character** file name and use the extension **frm**. For example, a WordPerfect letter might be **CRLETTER.FRM**.

6. After saving the file with a new name, make any modifications that you want to appear in this document. When you are finished, **save** the file again. (File, Save), then close the file.
7. Back in Best Case Bankruptcy, go to the Additional Documents screen.
8. Click the **Insert** button in the bottom left corner of the window.
9. For description, type the way you want the document to be listed in the Additional Documents screen, (you can use several words here) then press [Tab].
10. Type the 8 character name that you gave the file in Word or WordPerfect, without the extension. (This will automatically appear in all caps; e.g. CRLETTER.)
11. Click on the type of data used. You'll need to use the same type of data as in the original document. For example, if this is a client letter based on our template, the Voluntary Petition data was used.
12. Click **OK**.
13. The new document appears in the Additional Documents Library. You will now be able to use this document with any of your bankruptcy clients. To print, go to the Additional Documents Screen, highlight the document, and click the **Merge/Edit/Print** button in the bottom right corner. In the Print dialog box, click **Merge**. The document will open in your word processor where you can make any modifications then print it.

Adding a New Document to the Additional Documents Library

Adding documents requires **4 basic steps**, described in greater detail below:

- I. Create the document in Word or WordPerfect and save it in the appropriate subdirectory, giving it a file name Best Case Bankruptcy can understand. (Guidelines below). You can start from scratch or use an existing Word/WordPerfect file.
- II. Go into the Additional Documents Library and insert a new document. Specify the name you want to appear in the list, the type of data you'll be using, and the actual Word or WordPerfect file name.
- III. Use the Edit function in the Additional Documents Library to open the form in your word processing software and insert merge codes. Save the file.
- IV. Return to Best Case Bankruptcy where you can print the form from the Additional Documents Library with any of your client files.

To add a new document to the Additional Documents Library:

1. Start in Word or WordPerfect. Create your document, formatting it just the way you want it to appear, except without the merge codes.
2. When you are finished, you will need to save the file according to the following guidelines:
 - a. If your document was created in WordPerfect, save the file in the **BESTCASE\Adl_wp** directory. Give the file an 8 character file name with the file extension "frm". For example, a WordPerfect letter might be **CRLETTER.FRM**.
 - b. If the document was created in Word, save it in the **BESTCASE\Adl_ms** directory. Give the file an 8 character file name with the extension "wfm".

Because Word versions 7, 97 and 2000 automatically add the "doc" extension to all files, you'll need to put your entire file name in quotes to save the file with the wfm extension. E.g. - Type "CLLETTER.WFM" with the quotes for the file name.

If you want to use a document that you have already created, open the document in Word or WordPerfect then click File, Save As. Rename the file (as above) with an 8 character name and the wfm extension if in Word, frm extension if in WordPerfect. Save the document in the BESTCASE\Adl_wp directory if it is a WordPerfect document or in BESTCASE\Adl_ms directory if it is a Word document.

3. With the file created and saved, return to the Additional Documents Screen in Best Case Bankruptcy.
4. Click the **Insert** button in the lower left corner to index your document.
5. A window appears with "Additional Document Information" in the title bar. Type a description, which is the way the document will be listed on this screen, (you can use several words here) then press [Tab]. For the file name, enter the 8 character file name which you gave to your document in Word or WordPerfect, without the extension.
6. Select the type of data that you want to be merged into your document, then click **OK**. Your choices are:
 - a. **Voluntary Petition Information**, which includes all debtor information listed on the Voluntary Petition, Attorney Compensation Statement, Application to pay filing fee in installments, and information from the Client Notes section.
 - b. **Pick ONE Creditor** - complete with Voluntary Petition Information, which contains the name and address of any creditor you select from Schedule D, E or F plus debtor information contained in the Voluntary Petition data type above.
 - c. **Pick MULTIPLE Creditors, Contracts, Codebtors** - complete with Voluntary Petition Information, which contains the same field codes as the Pick ONE creditor data type, but will create a separate form for each creditor chosen. With this data type, you can choose parties from Schedule D, E, F, G or H or additional notice parties.
 - d. **ALL Creditors and others on Master Mailing Matrix** - Name/ address /acct. no only, which contains the names and addresses of all creditors in the case, along with any additional notice parties, WITHOUT debtor information.
 - e. **ALL Creditors and others on Master Mailing Matrix Complete with Voluntary Petition Information**, which gives you the names and address of all creditors and additional notice parties, along with debtor information in the Voluntary Petition data type above.
 - f. **Client List Information**, which gives you information from the Client Notes section of the program and some information from the Attorney Compensation statement and Chapter 13 plan.

The "Creditor Address Matrix" option is reserved for use by our programmers. You won't be able to edit documents which use this data type. The same data is available in the "ALL Creditors, Name and address" data type.

7. After you have clicked **OK**, your document is listed in the Additional Documents Screen. With the document highlighted, press [Ctrl]-[E] to edit the document. If you have both Word and WordPerfect installed, you will be asked to select the word processing software. Click **Edit ADL**.
8. Your document will appear in Word or WordPerfect. You can then insert the merge codes. (See the help topic merge codes for a list.)

If you are using WordPerfect, click the **Insert Field...** button to insert merge fields. If you are using Microsoft Word, click the **Insert Merge Field** button wherever you want to insert a field, then select the field you want. In WordPerfect 8.0, you will need to

associate the form with a data file. The data file can be found in the C:\BESTCASE\TEMP\DATA directory.

Tip: In Word, you can see how merged data will look as you work by doing the following: In the main menu, click the Tools option, then select Options. In the View tab, you'll see a list titled "Show". Make sure there is no check mark next to Field Codes. If there is, click on it to remove the check mark, then click **OK**.



In your document, you can then see how data will look by clicking the button in the toolbar.

9. When you have inserted all merge fields, save the document again then close it.

Back in Best Case Bankruptcy, you will now be able to use this document with any of your client files. To merge the document: open a client file, go to the Additional Documents Screen and highlight the document, then click the **Merge/Edit/Print** button in the bottom right corner, then click **Merge**. The document will appear in your word processing software with client data merged in. You can then print this document.

Troubleshooting

If you get a "File not found" error message when you click the **Merge/Edit/Print** button in Best Case, you probably have not saved the document properly in Word or WordPerfect. Open the document in your word processing software and save it again using the instructions above.