# M/Docs II Quick Start Guide

The information below will help you to get started with M/Docs II legal software. Please note that we have much more detailed information available, including a full manual with screen shots, which you can find under the M/Docs II Help menu.  As you familiarize yourself with the software, you can call up the **Help** material for the screen you are working in by pressing the **F1** key or by clicking on **Help** at the top of the screen. As in other Windows-based applications, the **Help** information will display in a separate window, allowing you to easily switch between the instructions and your work.

### To immediately access, manually fill and print a form:

From the Welcome Screen click on the **Create a new form** icon to open the form browser. Click on the "**+**" next to the module name to view the form groups. Click on the "**+**" to view a list of forms within the form group. Check the box next to the form you want and click **Select**. When the document appears, you can begin typing information in the blanks, moving your cursor from blank to blank using the tab key or your mouse.

### To store client data and use it to automatically fill a form:

From the Welcome Screen click on the **Maintain your list of clients** icon to be taken to the client screen. Click the yellow "**+**" on the tool bar to add a new client to the program. Type in the client name, phone number and other important notes. Click **Save** on the tool bar to keep that information.

1.     On the toolbar, Click **Add Matter** (located next to the **Save** icon) and select the type of matter that corresponds to your documents. Select one of the clients you created to associate with the matter. When the matter page opens, add an appropriate name to the **Matter Name** field. This tag should be unique enough to help you distinguish which Matters belong to which clients. To expand and collapse the various parts of the matter page, use the "**^**" button on the left side of the screen.  Remember to **Save** the completed matter. When finished, close the data page using the **Close** button at the bottom of the page or the "**X**" button at the top right of the screen.

2.     Click on the **Data** menu, this time, select **Draft By** to record the information about the professional (attorney, real estate agent, paralegal) preparing the documents. Once the data is entered, remember to click **Save**; then close the window.

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3.    Click **Auto-Fill New Forms** on the top tool bar and select the documents you need to prepare from the pop-up window; click **Select**. A series of screens will appear and ask you to select and confirm the **Matter** and **Draft by** data to be used in the documents. After you click the last **Select**, the documents will be placed on the **Client Forms** tab for your client. A dialog box will also appear confirming the creation of the new document in that location.  Click **OK**, and then close the Matter Page window.

4.    Click on the **Client Forms** tab to see the list of documents.  Click each individual form to display the document and verify that the data was properly entered. Complete the form by adding data to the empty blanks. You may then save your document and print it using the commands at the top of the page.  (To display areas of the document that still need to be completed, click the **Empty** icon on the toolbar to highlight areas without data.)

## View all previously saved forms:

At any time, you can view a list of all previously saved forms by clicking the **Data** menu and choosing **Forms**.

**Remember**: This program allows the user to automatically enter client data in more fields than were available in M/Docs. If any data you have stored and expect to appear on a form does _not_ show up, please double-check to ensure the data was entered in the most appropriate data grid.

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