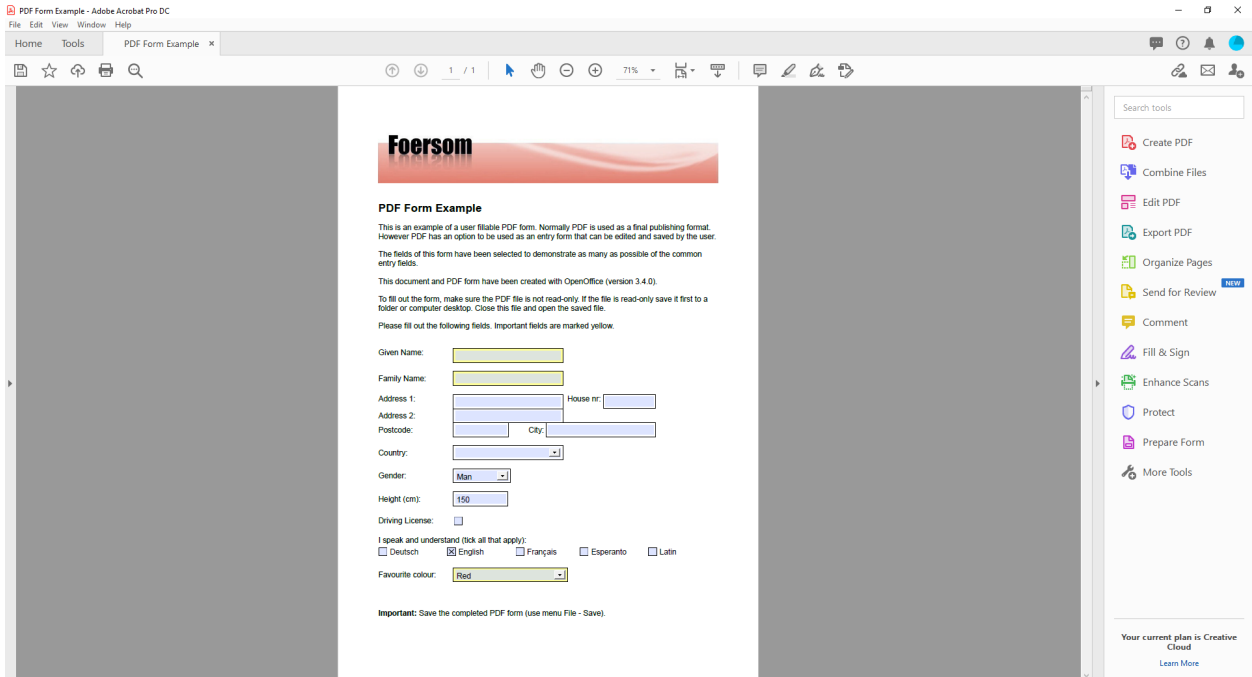


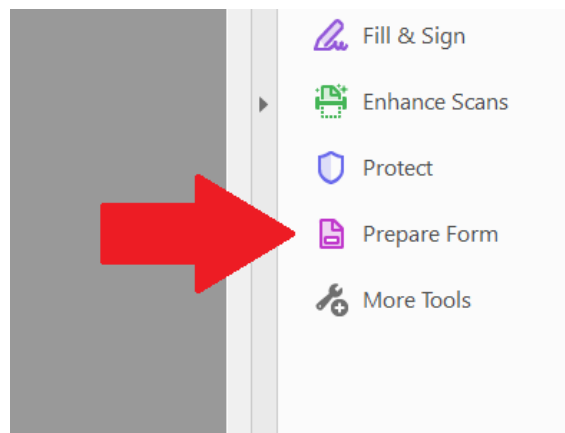
Steps to use PDF Wizard

With PDF Wizard, you can set each of your PDFs to auto-populate with your data in CaseTrackerLaw. This can be a little confusing to set up at first, but once your PDF is configured correctly in our system, you won't have to fill it in again, which will save you a lot of time.

For this walkthrough, we'll be using the following example PDF. You will need Adobe Acrobat Pro or Adobe Acrobat DC. For this, we'll be using the latest version.



For each of the PDF's boxes that you want filled in, you'll need to name something unique. In this version of Acrobat, the way to do this is by clicking Prepare Form on the right side menu. The option to edit the form might be different if you're using an older version of Acrobat.



This makes each box's name appear over the boxes. In this example, the form field names are 'Given Name Text Box', 'Family Name Text Box', etc.

Given Name:

Family Name:

Address 1: House nr:

Address 2:

Postcode: City:

Country:

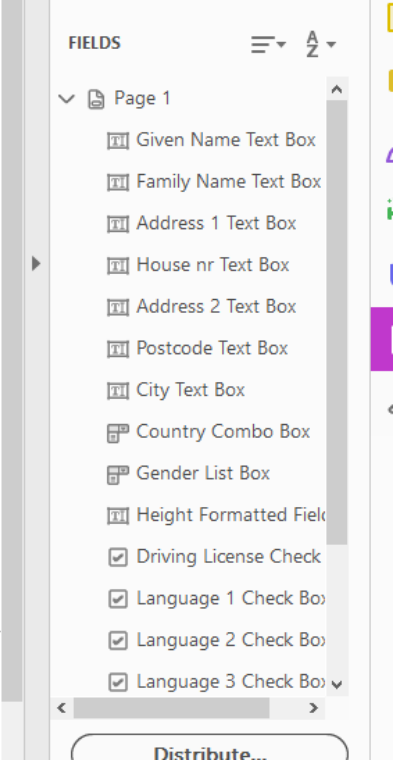
Gender:

Height (cm):

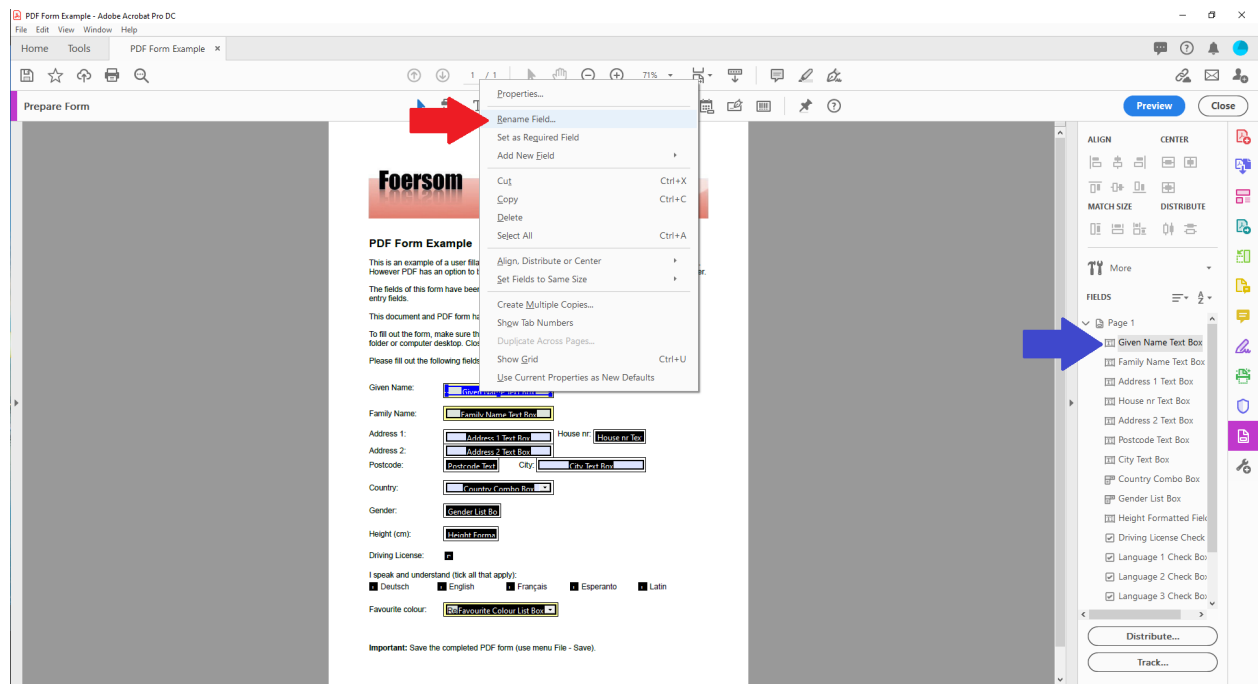
Driving License:

I speak and understand (tick all that apply):
 Deutsch English Français Esperanto La L

Favourite colour:



To rename them, right click a box and click 'Rename Field' (red arrow), or you can right click the name on the right side menu for each box (blue arrow).



PDF Form Example - Adobe Acrobat Pro DC

Home Tools PDF Form Example x

Prepare Form

Foersom

PDF Form Example

This is an example of a user file. However PDF has an option to lock the fields of this form have been entry fields.

This document and PDF form have been locked. To fill out the form, make sure the folder or computer desktop. Close this document and PDF form.

Please fill out the following fields:

Given Name:

Family Name:

Address 1: House nr:

Address 2:

Postcode: City:

Country:

Gender:

Height (cm):

Driving License:

I speak and understand (tick all that apply):
 Deutsch English Français Esperanto Latin

Favourite colour:

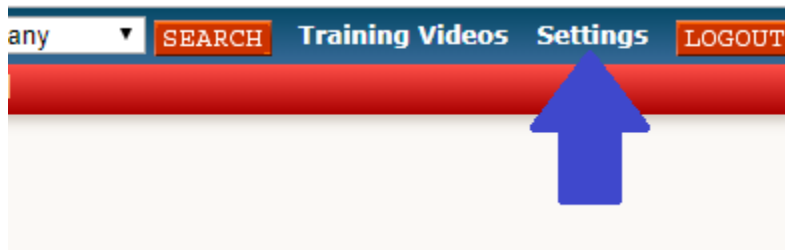
Important: Save the completed PDF form (use menu File - Save).

For our example, I'm renaming the box for Given Name 'given_name'. When you're doing this for your own PDFs, you'll want to rename all the boxes that you want automatically filled in with data.

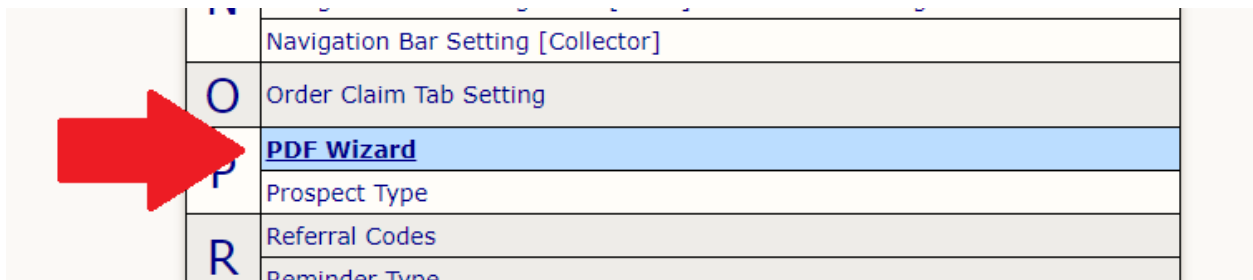
Given Name:

Once all of your form field boxes have been given unique names, save your PDF.

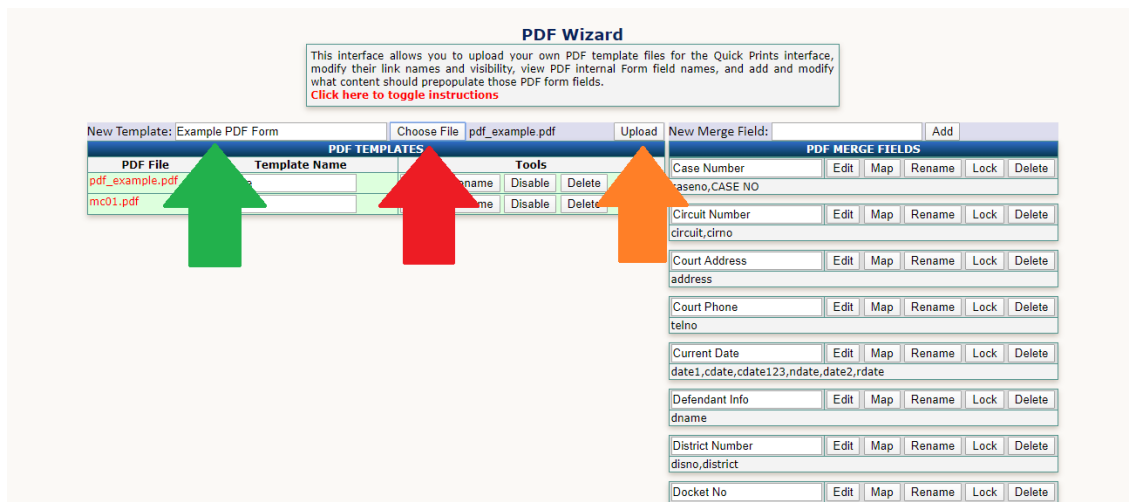
Now you should go to your CaseTrackerLaw system and log in. Then you can click the Settings link in the top-right side of the screen.



Then scroll down until you see the link for PDF Wizard.



On the PDF Wizard screen, you should type in the name of your document (green arrow), click the Choose File button (red arrow) and select your PDF file from your computer, and then click the Upload button (orange arrow).



The file will upload and should show up at the bottom of your list of PDFs on the left side of the screen.

New Template: Choose File No file chosen Upload New Merge Field:

PDF TEMPLATES						
PDF File	Template Name	Tools				
pdf_example.pdf	Example	View	Rename	Disable	Delete	
mc01.pdf	MC01	View	Rename	Disable	Delete	
PdfFormExample.pdf	Example PDF Form	View	Rename	Disable	Delete	

PDF

Case Number
caseno,CASE NO

Circuit Number
circuit,cirno

Court Address
address

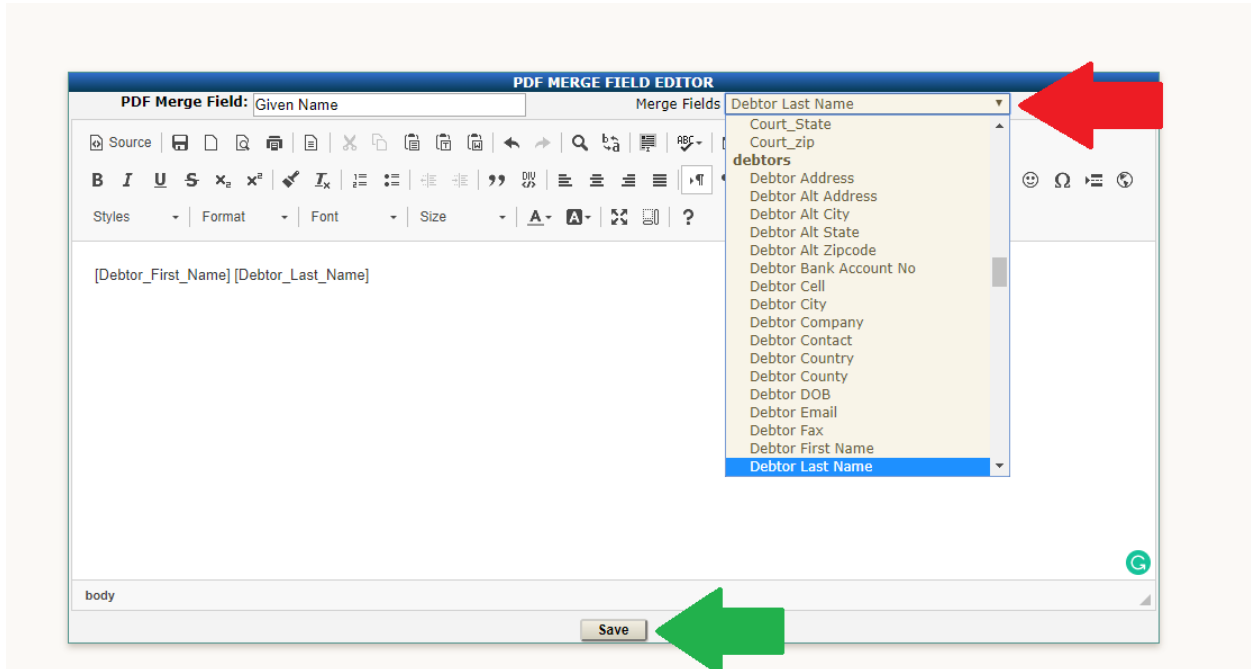
Now it's time to tell PDF Wizard which fields need to be mapped to the data. For our example, I have the Given Name field that I renamed in the PDF earlier. I'll give the Merge Field a name 'Given Name' and click the Add button.

Upload New Merge Field: Add

PDF MERGE FIELDS					
Case Number	Edit	Map	Rename	Lock	Delete
caseno,CASE NO					
Circuit Number	Edit	Map	Rename	Lock	Delete
circuit,cirno					
Court Address	Edit	Map	Rename	Lock	Delete
address					
Court Phone	Edit	Map	Rename	Lock	Delete

This will take you to the Merge Field Editor screen. Here you will specify what data you want merged into a particular box. For our example, I want the debtor's name merged into that box. So, I click the drop down menu for Merge Fields (red arrow). I selected 'Debtor First Name', and then again for 'Debtor Last Name'. In the editing area, [Debtor_First_Name] and [Debtor_Last_Name] appeared. Once the rest of the configuration is complete, this will mean that 'John Smith', or whatever the debtor name is, will appear in our box in the PDF.

Once you're done, click the Save button at the bottom.

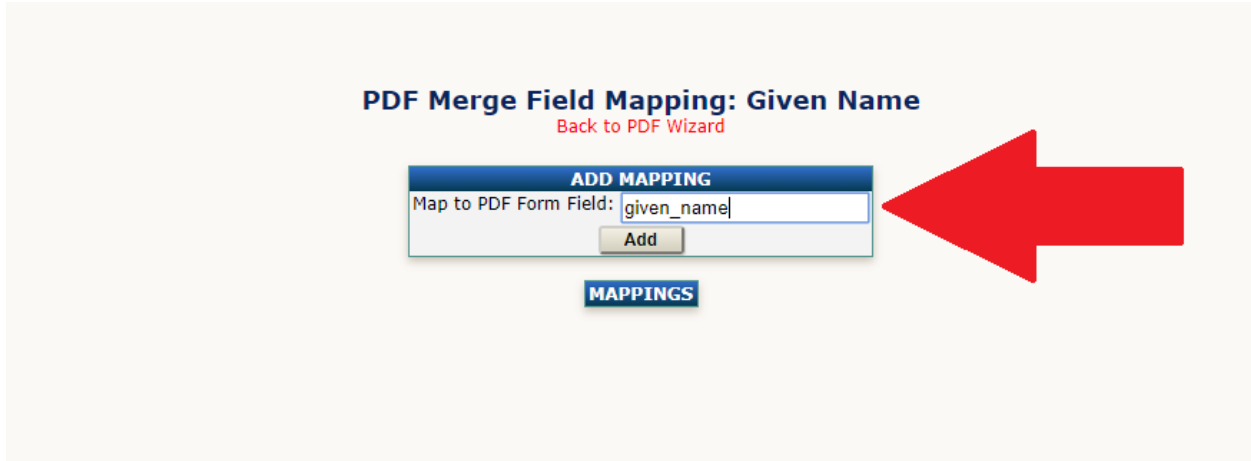


Just a reminder, this is what we put in our PDF as the form field name for our example box:

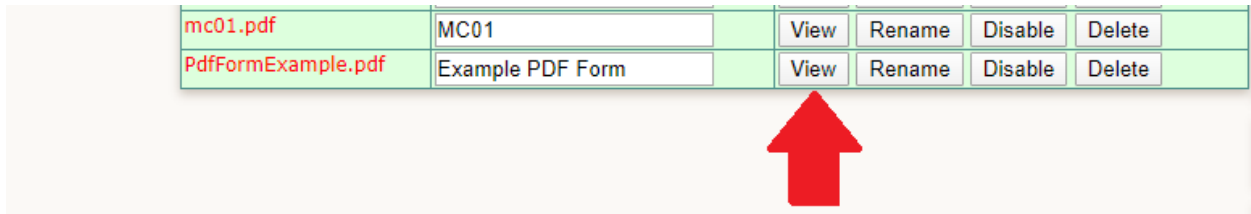
Please fill out the following fields. Important fields are marked yellow.

Given Name:

You'll be directed to the Mapping screen, where you will then put in the form field name you specified in Adobe Acrobat for this particular box. We named it 'given_name' so type that in here and click the 'Add' button. You can input as many different names as you want here, so if there was another box that you want the [Debtor_First_Name] [Debtor_Last_Name] to be filled in, you can add those box names here as well.



Now back on the main PDF Wizard screen, you can click the View button next to your PDF to view it.



Here in this View screen, you'll see your PDF with the form names. For every box that has been successfully mapped, there will be an asterisk in front of the name.

Given Name:

Once you've done this process for every box that you want automatically mapped to data, you can go into any claim, click the Quick Prints blue tab, and generate a version of your new PDF with those boxes automatically filled in with your data.