

About the Pleading Expert

The Pleading Expert is a two-part, step-by-step process used to create pleading styles and insert information into pleading documents. The two separate components of the Expert are the Designer (styles) and the Filler (information). Because the pleading styles and information are stored in a database, you can quickly create multiple pleading documents based on customized pleading styles for different courts and cases.


Designer

The Pleading Expert Designer guides you through the steps needed to create custom pleading styles that meet the requirements for separate courts. Use the Designer to assign court, page, margin, font, line numbering, header and footer, and signature block settings. After you have created a pleading style, you can use the Pleading Expert Filler to fill in the information for the pleading document. You can create as many pleading styles as you need.


Filler

The Pleading Expert Filler is where you insert the information for a pleading document. When you want to generate a pleading, you will open the Filler, select a pleading style, and complete the prompts for attorney names, case, firm names, and parties involved. The Filler stores this information in a database so if you need to create another pleading for the same case, you can open a previously created case and simply complete the required steps to fill in the information.

 [To create a pleading style](#)

 [To create a pleading document](#)

To create a pleading style,

1 Click , or click **Tools**

▶ **Legal Tools**

▶ **Pleading Expert Designer.**

2 Click **Next**.

3 Click **New pleading style**, type a unique name for the style in the New pleading style name text box, then click **Next**.

4 Continue through the steps as you select the style options you want.

5 Click **Finish** to complete the pleading style, then click **Yes** (optional), to access the Filler Expert and complete the pleading document.

Tips

- The Pleading Expert Designer provides two predefined pleading styles. Select a predefined style, click Next, enter the court name, then continue clicking Next to complete the Expert.
- Make sure the **Start the Pleading Expert Filler upon choosing 'Finish'** check box is selected to open the Filler Expert upon exiting the Designer Expert.
- The Designer Expert automatically displays a WYSIWYG preview window of the pleading document. You can resize, position and close the Preview window separately from the Expert.




[Related Topics](#)



[About the Pleading Expert](#)

To create a pleading document,

1 Click , or click **Tools**

▶ **Legal Tools**

▶ **Pleading Expert Filler.**


2 Click **Next**.

3 Click **New case**, type a unique case name in the New case style name text box, then click **Next**.

4 Continue clicking **Next** as you fill in the prompts for each step.

5 Click **Finish** to save and close the Filler Expert.

Tips


- ◆ Click  in the top-right corner of the Expert, then click a feature for a description of it.
- ◆ The listed steps on the left side of every dialog box will become shaded when you enter that step to select the available options.



[Related Topics](#)

[About the Pleading Expert](#)

To copy a pleading style,

1 Click , or click **Tools**

▶ **Legal Tools**

▶ **Pleading Expert Designer.**

2 Click **Next**.

3 Click **Copy from existing style**.

4 Highlight the pleading style that you want to copy from the Available pleading styles list box.

5 Type a unique name in the New pleading style name text box, then click **Next**.

6 Continue through the steps to complete the new pleading style.




[Related Topics](#)



[About the Pleading Expert](#)

To edit a pleading style,

1 Click , or click **Tools**

▶ **Legal Tools**

▶ **Pleading Expert Designer.**

2 Click Next.

3 Click Edit style.

4 Select the court's pleading style you want to edit from the Available pleading styles list box, then click **Next**.

5 Edit the remaining steps, then click **Finish** to save the changes.

Tips

- ◆ The separate steps for the Designer are listed on the left of every dialog box. You can click on a step and go directly to that dialog box for quick editing changes.




[Related Topics](#)



[About the Pleading Expert](#)

To delete a pleading style,

1 Click , or click **Tools**

▶ **Legal Tools**

▶ **Pleading Expert Designer.**

2 Click **Next.**

3 Click **Delete style.**

4 Click **Next.**


5 Click **Yes** to confirm the deletion.



[Related Topics](#)

[About the Pleading Expert](#)

To copy case information,

1 Click , or click **Tools**

▶ **Legal Tools**

▶ **Pleading Expert Filler.**

2 Click **Next**.

3 Click **Copy an existing case**.

4 Type in a unique name in the New case name text box, then click **Next**.

5 Complete the steps of the Expert, then click **Finish** to save and close it.

Tips


- It is easier to copy a similar case and edit it than to create a new one from scratch.



[Related Topics](#)

[About the Pleading Expert](#)

To edit case information,

1 Click , or click **Tools**

▶ **Legal Tools**

▶ **Pleading Expert Filler.**

2 Click **Next**.

3 Click **Edit case information**.


4 Highlight a case from the Existing cases list box, then click **Next**.

5 Complete the steps of the Expert, then click **Finish** to save and close it.

 Related Topics

 About the Pleading Expert

To delete case information,

1 Click , or click **Tools**

▶ **Legal Tools**

▶ **Pleading Expert Filler.**

2 Click **Next**.

3 Click **Delete case information**.

4 Click **Next**, then click **OK** to confirm the deletion.

 Related Topics

 About the Pleading Expert

The Pleading Expert Designer is used to create pleading styles for different courts or cases. This expert guides you step-by-step through setting up default court settings (such as page, margin, and line settings). After you have created the pleading style, you can use the Pleading Expert to create multiple pleading documents for a single court or case.

A list of the steps involved in setting up the default court styles. Click on a step to modify or complete it. A filled box on the left indicates that the step has been previously accessed or completed.

Displays a preview of the document as it will appear when printed. The position and size of the Preview window are saved when you exit the expert. You can also position the expert and the Preview windows separately.

Moves to the previous step of the expert.

Moves to the next step of the expert.

Closes the expert without saving any changes you have made.

Completes the current step of the expert, and then closes the expert.

Create, copy, edit, and delete pleading styles.

Creates a new pleading style from the default court settings style. You must type a unique name in the New pleading style name text box.

Creates a copy of the selected Available pleading style. You must type a unique name in the New pleading style name text box.

Type the name of the new or copied pleading style here to add it to the list of Available pleading style templates.

Lets you edit the selected Available pleading style.

Lets you delete the selected Available pleading style. Requires confirmation before deleting.

Lists all available pleading styles that you can copy, edit, or delete.

Type and align the court and district name, court jurisdiction, and address information.

Type the name of the court as it should appear on the pleading in this text box.

Horizontally aligns the Court Name on the document.

Select the page size and page numbering options.

Select the paper size you will print the pleading on.

Select whether there will be page numbering in the document and where page numbering will begin.

Select the page on which numbering will begin.

Select the page numbering style.

Select the position of the page number on each page.

Set top, bottom, left, and right page margins for the caption and following pages.

Margin setting from the top of the page to the first line of text on caption pages.

Margin setting from the top of the page to the first line of text on pleading pages.

Margin setting from the bottom of the page to the bottom line of text.

Margin setting from the left of the page to the text.

Margin setting from the right of the page to the text.

Specify the font type and size for the body of the document, the footnotes, and the line numbering.

Select the font for document text. Type the first few letters of a font name to jump to it without scrolling.

Select the size for document text (from 8 to 16 points).

Select the font for footnote text. Type the first few letters of a font name to jump to it without scrolling.

Select the size for footnote text (from 8 to 16 points).

Select the font for line numbering text. Type the first few letters of a font name to jump to it without scrolling.

Select the size for line numbering text (from 8 to 16 points).

Add line numbers to pages, designate line spacing on pages, and select border types.

Select the spacing for line numbering.

Select how many line numbers will print on a page.

Click this box to turn line numbering on or off.

Select a border style for the left margin of pages.

Select a border style for the right margin of pages.

Select line spacing options for the caption.

Select line spacing options for the body of the document.

Select the information you want to be prompted for in the Pleading Expert.

Select this option to place the attorneys' names and the firm's name in the top-left corner of the pleading's first page.

Select this option to place the judge's name in the top-right corner of the pleading's first page.

Select this option to place the pleading title summary in the bottom-left corner of every footer page.

Select this option to place the firm's name and address in the bottom-right corner of every footer.

Choose from six different Caption styles or use no Caption style.

Select this option if you do not want a caption on your pleading.

A three-column style for the caption box.

A three-column style for the caption box.

A three-column style for the caption box.

A three-column style for the caption box.

A three-column style for the caption box.

A single-column style for the caption box.

Select options and formats to include in the signature block of the pleading.

Select this option if you want a signature block on your pleading.

Select the text that introduces the signature line.

Choose how to position the firm name and address in the signature block.

Select this option if you want the date included at the top of the signature block.

Select this option if you want a line for the signature to be written on.

Choose how to align the signature block.

Final step of the expert. Before you click Finish, you can go back and modify any of the completed steps.

Select this option to start the Pleading Expert Filler when you choose Finish for the Pleading Expert Designer.

The Pleading Expert Filler is where you add information for a given case. The Pleading Expert Filler stores the information in a database so if you need to create a similar pleading for the same case, your basic document is already set up and you simply follow the prompts.

A list of the steps involved in filling in the information for the pleading document. Click on a step to modify or complete it. A filled box on the left indicates that the step has been previously accessed or completed.

Moves to the previous step of the expert.

Moves to the next step of the expert.

Closes the dialog box and saves all information to the database, but it will not create the pleading document.

Completes the current step, closes the expert, and then creates the pleading document.

Select new cases or copy existing cases. You can also select an existing case to edit and delete the case information.

Creates a new case. You must type a unique name in the New case name text box.

Creates a copy of the selected existing case. You must type a unique name in the New case name text box.

Type the name of the new or copied case here to add it to the list of existing cases.

Lets you edit the information in the selected case.

Lets you delete the information in the selected case. Requires confirmation before deleting.

Lists all available existing cases that you can copy, edit, or delete.

Select a court style to be used for the pleading document. The courts you can choose from are from the list of pleading styles that you created using the Pleading Expert Designer.

Select a previously created court setting style here. To create a new court setting style, use the Pleading Expert Designer before using the Pleading Expert Filler.

Create title information, case number information, and the number of firms filing this pleading. All information will be entered into a database for future retrieval.

Type the pleading title as it should appear on the caption.

Type the pleading title summary as it should appear in the footer.

Enter the case type and the case number as it should appear in the caption.

Select the number of firms filing with this pleading (from 1 to 5).

Enter information about the type of parties involved in the case and the names of involved parties.

Select the type of party involved.

Type the names of the complaining parties in the text box.

Type the names of the defending parties in the text box.

Enter information regarding attorneys' names and addresses. The number of steps for this section depends upon the number of firms selected in the Title & Case Number step.

Type the names of your firm's attorneys who are involved with this particular case.

Select this check box if you want to include the line "Attorney(s) for" in the top-left corner of the pleading.

Select the type of litigant to include with the "Attorney(s) for" line.

Type in your firm's name and address as you would like it to appear in the pleading document.

Click Finish to save and exit the Pleading Expert Filler and open WordPerfect to begin assembling the pleading cover page. To change any information in this expert, click Back (or click a step from the list.)

Enter the judge's name as it will appear on the pleading document.

