

Law firm saves time and money by creating custom-made macros in WordPerfect® Office

Overview

Name: Cynthia Zook

Company: Blakinger, Byler & Thomas Law Office

Location: Lancaster, Pennsylvania

Industry: Law

Product: Corel® WordPerfect® Office



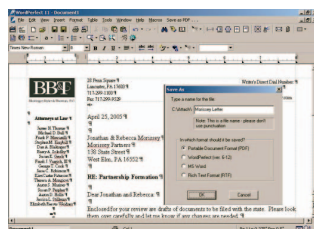
Blakinger, Byler & Thomas, P.C.

In her role as the Network Administrator, Ms. Zook supports 18 attorneys and the rest of the staff by responding to incoming requests as well as anticipating upcoming bottlenecks in the workflow. A typical example is the preparation of letters.

"Attorneys are often very particular about the formatting of their letters," says Cynthia Zook. "They each have different preferences regarding font, font size, closing phrase, et cetera. I wrote a macro in WordPerfect that presents a dialog box asking the user 'Who will sign this letter?' The macro then merges the existing document with a letterhead form to customize the letter for that attorney by inserting the correct direct-dial telephone number, email address, and letter signature."

Blakinger, Byler & Thomas uses similar macros to produce letters, memos, fax cover sheets, bills, as well as mailing labels, and several legal-specific documents. The main benefit is that the correspondence for each attorney has a consistent look and the secretaries don't have to know how to do all of the steps manually.

"When an attorney dictates a letter to a secretary, the document will normally be printed onto pre-printed letterhead and sent via regular mail, so there is no letterhead information in the WordPerfect document. Now, let's say the attorney asks that the letter be emailed to the recipient instead. I've created a macro that will insert the letterhead graphics into the WordPerfect document, position the text accordingly, and save it as a PDF."



Macros are often perceived as a way of making tasks quicker, but the macros at Blakinger, Byler & Thomas also make certain tasks much easier.

"The attorneys have to bill each hour to a specific project, which means they don't have a lot of time to figure out technical details about file formats and so on," says Cynthia Zook. "If they want to send a WordPerfect document as a PDF file via email, they appreciate a macro on the default toolbar that saves the document in PDF format and launches their email client with the document attached to it. One click, that's all it takes."

Another popular WordPerfect feature at Blakinger, Byler & Thomas is the powerful Merge function, where WordPerfect is used as a database.

"Certain types of cases involve a number of standard form documents with empty sections for information such as names, addresses, signature lines with pre-printed names et cetera. Instead of re-typing the information for each document, the secretary fills out a single data merge file and merges that file with each of the merge form documents," explains Cynthia Zook.

The client information has to be typed only once in the data merge file. Not only does this process save a tremendous amount of time, it also cuts down on clerical errors.

According to Cynthia Zook: "In one of the types of cases we do, it used to take at least two or three hours for the secretary to accurately produce and proof the necessary documents. By using Merge in WordPerfect, it takes about 15 minutes, and the error rate is much lower!"

WordPerfect also works well with common third-party applications like ProForm from SoftPro Corporation. ProForm serves the real estate market by offering an automated closing and title insurance software solution. The paralegals at Blakinger, Byler & Thomas use SoftPro applications to produce settlement sheets, manage the trust accounts, and print the checks. ProForm also merges with WordPerfect so that a paralegal preparing a real estate settlement can set up a WordPerfect merge form and then merge it with the ProForm data file.

"We have about 150 WordPerfect merge forms for merging with ProForm," says Cynthia Zook. "WordPerfect is ready to handle pretty much anything we throw at it."

The Blakinger, Byler & Thomas client list is a WordPerfect data file with fields for names, addresses and general information about the clients' cases.

"We could use a database program for this of course, but it works fine for us in WordPerfect," laughs Cynthia Zook.

"We have close to 15,000 entries in the data file, and we regularly pull out specific lists, such as the clients of a particular attorney, all of our estate planning clients et cetera. All you have to do is sort the text fields in WordPerfect."

When changes to corporate tax law were announced, the firm was able to use the WordPerfect list to pull out a subset of clients that were going to be affected by the new law, and quickly produce both the letters and the envelope labels for a targeted mailing.

If anyone doubted Cynthia Zook's ability to use WordPerfect creatively, she also uses WordPerfect to run the firm's Intranet.

"We use WordPerfect documents with hyperlinks. It's a bit unorthodox, I guess, but it works extremely well for what we want to do with it," she says.

Each practice area within the firm has a "page" on the WordPerfect Intranet. When a user clicks the hyperlink for a particular form document, the hyperlink launches a macro instead of just opening the form. The macro asks if the user wants to print a copy of the form document or if they want to fill it out. The form documents are merge documents, and if the user elects to fill the form out, the macro launches the merge process.

"We also use the Intranet to distribute and provide easy access to our office telephone list, explanation of office procedures, the employee manual, newsletters, computer instructions, forms, et cetera. All of which are WordPerfect documents," explains Cynthia Zook.

The company has a firm-wide Internet bookmark list as part of its Intranet. Rather than people having to share important URLs with each other, people just submit them to the librarian, who maintains this page of the WordPerfect Intranet.

Cynthia Zook also uses the built-in Publish to HTML feature in WordPerfect for the firm's Website.

"Someday I'll probably move our WordPerfect Intranet out of WordPerfect and into HTML, and I'll use WordPerfect's publish to HTML feature to produce pages for the HTML Intranet. But the solution we have now works beautifully," she concludes.

For more information please visit www.corel.com/wordperfect.

The image shows three overlapping windows from the WordPerfect software interface. The largest window in the background is titled "New File Card & Memo" and contains fields for client information: CLIENT NAME (Morissey Partners), CLIENT ADDRESS (138 State Street, West Elm, PA 16552), PHONE NUMBERS (HOME, BUSINESS: (721) 811-8168, FAX: (721) 811-6810, MOBILE), CLIENT/MATTER NO. (54862.118), and CASE TYPE (38) with initials (RKH). It also has sections for MATTER DESCRIPTION (General partnership formation and operations), DESCRIPTION FOR FILE OPENING MEMO (Partnership Formation), ADVERSE PARTY, and RELATED PARTIES (Jonathan A. Morissey, Rebecca J. Morissey). Overlaid on this is a "Fax" dialog box with fields for T to (Morissey Partners), Fax Number ((721) 811-6810), No. of Pages (3), and File No. (54862.118). It includes checkboxes for "This fax will be sent today - fill in the current date" (checked) and "This fax will be sent immediately - fill in the current time" (unchecked). The smallest window in the foreground is titled "Certified Mail" and contains fields for Article Number (1088 4236 3065 0369 3069), Addressee (Morissey Partners, 138 State Street, West Elm, PA 16552), Your Name (for return mail) (RKH), and Client Number (opt.) (54862.118). It has OK and Cancel buttons.