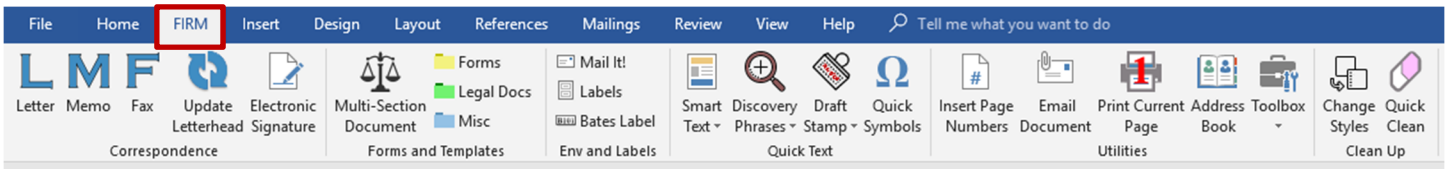
SmartTabs© Custom Word 2016 Tabs for Law Firms

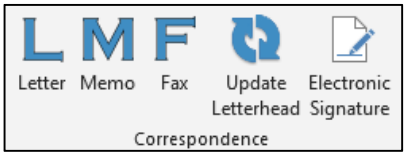
List of Features

Firm Tab

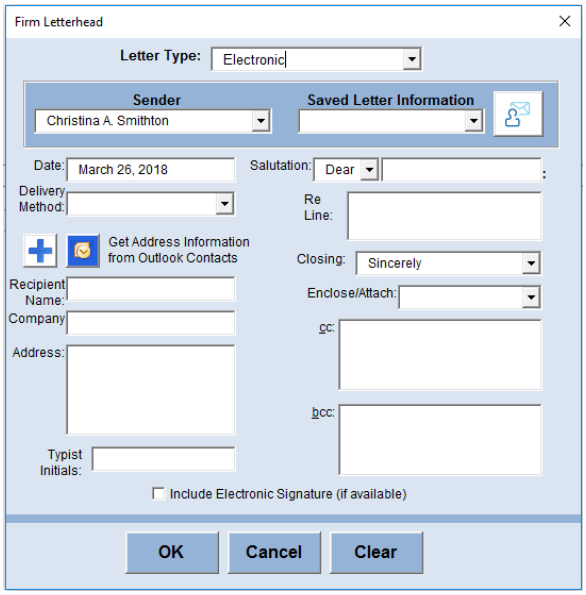


- Choose name of tab and location within Word Ribbon
- Fully customized for firm - include/exclude any group or button

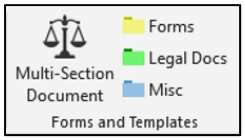
Correspondence Group



- Letter / Memo/ Fax templates - customized to current firm standards
- **Update Letterhead** - Add letterhead to any document or quickly change letter type/author
- **Electronic Signature** - Insert a "picture" of signature at cursor location, or include it automatically in a generated letter
- User-friendly, simple dialog boxes to quickly fill Letter/Memo/Fax
- Ability to save and re-use frequently generated documents
- "Sticky" fields such as letter type, author, and closing remembered from last Letter/Memo/Fax
- Access address information from Microsoft Outlook, including shared contacts
- Separate quick form to add multiple recipients



Forms and Templates Group



- **Multi-Section Document** button - creates multi-sectioned document with accurate page numbering - select sections for TOA, TOC, Motion, Order, Certificate of Service, Exhibits, etc.
- **Forms** / **Legal Docs**/ **Misc** buttons to access firm template storage
- Choose any three folders - Administration, Accounting, Corporate, etc…
- Also includes instructions for firm personnel on maintaining the folder contents

Env and Labels Group

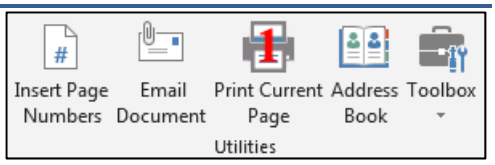
- **Mail It!** Button - generate an envelope or firm label directly from a letter or by selecting an address in a document
- **Labels** button to access all other firm label templates
- **Bates Label** button to access Bates Label Generator

© On Track Resources 2018

Quick Text Group

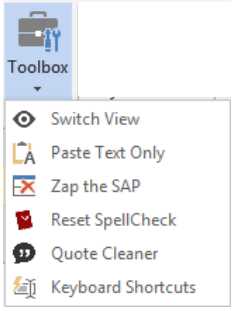
- **Smart Text** - list of common firm "boilerplate" text inserted in document with one click - divided into firm oriented categories
- **Discovery Phrases** - common discovery phrases with numbering - "Interrogatory No. 1", "Response to Interrogatory No. 1", etc.
- **Draft Stamp** - insert a draft stamp with custom text in a selection of positions
- **Quick Symbols** - most frequently used symbols

Utilities Group



- **Insert Page Numbers** - utility to add custom page numbering to document section
- **Email Document** - quickly email the current document as PDF or Word document and customize the attachment name
- **Print Current Page** - customized to work with document management system
- **Address Book** - add address information from personal or shared Outlook contacts

Utilities Toolbox



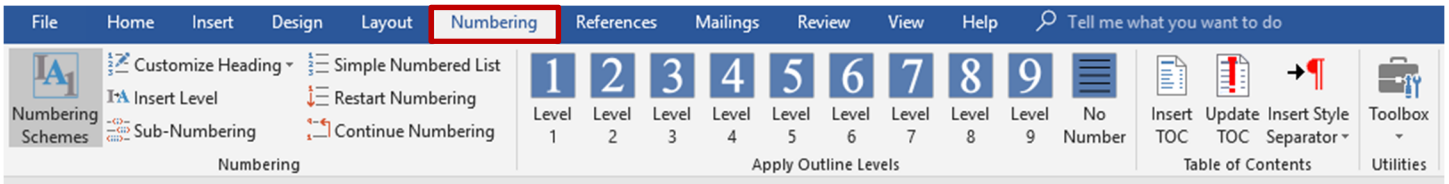
- **Switch View** - quickly switch between Print Layout and Draft views
- **Paste Text Only** - paste command to remove unnecessary formatting
- **Zap the SAP** - turns off the <u>Same As Previous</u> option in all headers & footers at once
- **Reset SpellCheck** - resets all previously ignored misspelled words
- **Quote Cleaner** - tool to change all quotes from straight to curly or vice versa
- **Keyboard Shortcuts** - quickly get to the dialog to create/maintain your personal keyboard shortcuts

Clean Up Group

- **Change Styles** - select from a list to apply firm defined styles to any document
- **Quick Clean** - quickly remove direct font and paragraph formatting, leading tabs and empty paragraphs

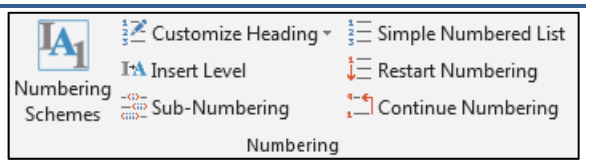
© On Track Resources 2018

Numbering Tab



- Choose location of tab within Word Ribbon
- Fully customized for firm - include/exclude any group or button

Numbering Group

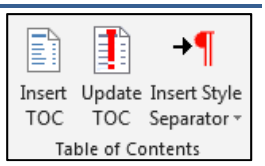


- Apply firm numbering schemes quickly and easily
- Five schemes included with instructions on how to create more schemes for your firm
- **Customize Heading** - ability to quickly modify the heading level using most common options (bold, double-space, wrapping text to margin, etc.
- **Insert Level** - insert the next heading level into current heading (sub-heading)
- **Sub-Numbering** - create a "numbered list" within a single paragraph
- **Simple Numbered List** - create a simple 1-2-3 list
- **Restart/Continue Numbering** - restart or continue numbering within a list

Apply Outline Levels

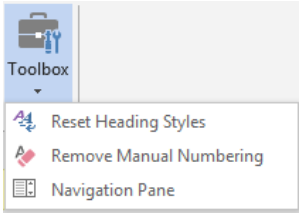
- Buttons to quickly apply different heading levels to current paragraph
- **No Number** button to apply a body text style
- Can also use keyboard shortcuts CTRL+ALT+1, CTRL+ALT+2, CTRL+ALT+3, etc…

Table of Contents Group



- Buttons to **Insert** and **Update** the Table of Contents
- Choose how many levels are used in the TOC
- **Insert Style Separator** button to use modified (shortened) text in TOC
- Ability to insert or delete <u>multiple</u> style separators at once

Numbering Tools Toolbox



- **Reset Heading Styles** - reapplies the appropriate Heading style to all the heading paragraphs
- **Remove Manual Numbering** - tool to help remove manually typed numbers in document and prepare for using outline numbering
- **Navigation Pane** - quickly turn the New Nav Pane on and off

© On Track Resources 2018

Also Included

- Available for single office or multiple office firms
- Author/Sender list maintained by firm personnel with easy-to-use Access database
- **Firm Building Blocks** template to create and store firm-wide building blocks
- Two customized style sets - Single-Spaced and Double-Spaced
- Eight hours of customization time (or twelve hours for firms over 100 users), used however it is needed. For example:
    - Creating initial letter/memo fax templates
    - Adding multiple letterheads and/or letter footers
    - Modified Quick Access Toolbars for Word, Excel, PowerPoint
    - Customized settings for standard Word options / status bar
    - Customized Normal template based on firm standards
    - Incorporating existing firm macros into new tabs

Also Available (Not included)

- Site Survey / Interviews to help determine firm needs
- Additional customization time beyond the initial 8 hours
- Link letter author information to Active Directory (additional custom fields required)
- Consulting for rollout / installation procedure
- **Professional Training Sessions** on using SmartTabs and/or Office 2016

© On Track Resources 2018