

Thank you for choosing

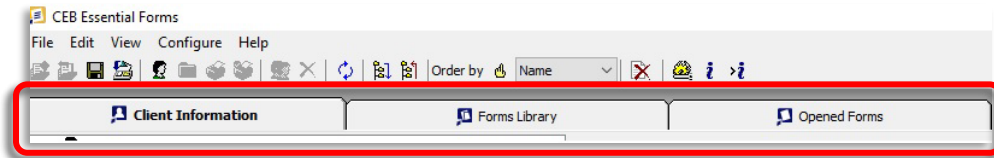


Essential Forms™

Quick Start Guide

Now that you've downloaded the latest Essential Forms™ software, let's get it working for you. You'll soon see why thousands of California attorneys use and trust us to save them valuable time and improve the quality of their forms.

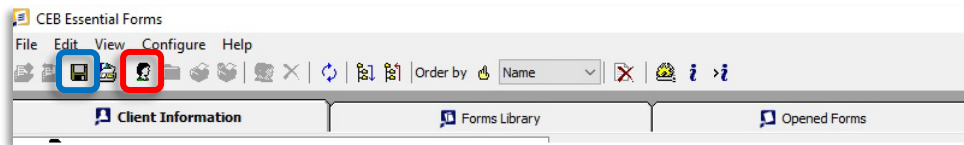
This guide is designed to be a quick reference for getting started with Essential Forms basics. For more detailed instructions, images, and information, please see the current User's Manual.



When you first start Essential Forms, you'll see four tabs near the top of your screen. The first *three* are shown above. These three tabs are your key to using this software.

- **Client Information Tab:** This is where your client information and completed forms are saved.
- **Forms Library Tab:** This is where all the *blank* forms are stored, and where you start when creating a new form for your client.
- **Opened Forms Tab:** This is the “workspace” where all your currently-open forms are held.

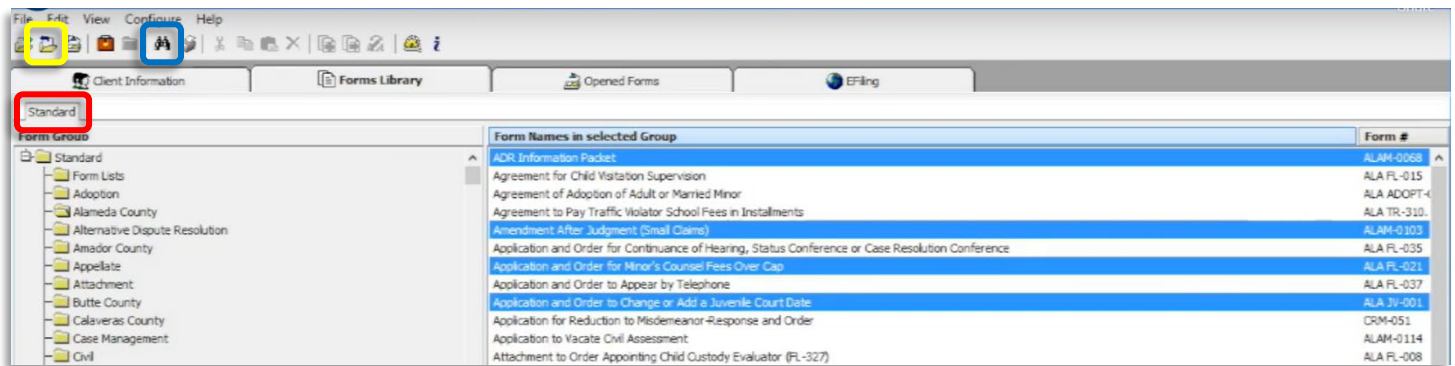
Adding a new client:



Once you've entered the information here, it will be auto-populated into each form you open for this client.

1. Click on the **Client Information** tab.
2. Click on the **New Client** icon on the tool bar (see above in red). A small window called **Client Database Assistant** will appear.
3. Fill in the **Client Name** and **Matter Name**. The matter name can be anything that will help you distinguish this from other matters for that client. The default matter name is “New Matter” if nothing is entered. Click **OK**.
4. Another dialogue box will appear, asking you to **Select Filing Court**. From the pull-down list, select a court that has been previously entered, or click the **Add/Edit stored courts** button to add another court.
5. Once a court has been chosen, you will see the **Select Filing Attorney** screen. From the pull-down list, select the attorney that has previously been entered, or click **Add/Edit stored attorneys** button to add another attorney.
6. Once the attorney has been added, you will see the new client folder appear under the Client Information tab on the left side. Clicking the arrow next to the client name will expand the folder to show all matters for this client.
7. Now click on the Matter Name you would like to work on. The **Client Profile** data-entry screen will appear. Enter the client's information once here to auto-populate the forms you create for this client matter. There are several tabs located along the bottom of this screen. Always complete the **General** tab, then choose which other tabs to complete based on what is relevant to the case.
8. Save the client profile by clicking the **Save** icon (see above in blue).
9. To create an additional new matter for this client, simply select the client name, then select **New Matter** from the **File** menu.

Selecting and Opening a Blank Form:



Once you have added a new client and created a client profile, you'll want to start adding needed forms.

1. Click on the **Forms Library** tab. Just under this tab, you will now see one smaller tab called **Standard** (see above in red).
2. Under the **Standard** tab, you will find several **Form Groups**. These are *blank* forms arranged alphabetically in groups designated by the Judicial Council.
3. Click on the form group folder you are interested in. The list of forms contained in that group will appear on the right. To search for a specific form, click the **Search** icon (see above in blue), select how you would like to search (by form group, form name, or form number), enter your search terms, and click **Search**.
4. To open a form, double click the form name. You will automatically be taken to the **Open Forms** tab, and your form will be ready to be filled. To open multiple forms at once, hold down the <Ctrl> key while selecting the forms you would like to open, then click the **Open Selected Forms** icon (see above in yellow).
5. Once in the **Open Forms** tab, each open form will have its own tab on the bottom left of the screen.

The screenshot shows the 'Open Forms' tab in the Essential Forms software. The form is for the Superior Court of California, County of... The form includes fields for Party Without Attorney or Attorney, Superior Court of California, County of..., and sections for Petitioner and Respondent. The bottom of the form shows a list of open forms: FL-800, FL-300, FL-100, FL-370, and FL-160.

PARTY WITHOUT ATTORNEY OR ATTORNEY STATE BAR NO.:

NAME: _____

FIRM NAME: _____

STREET ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

TELEPHONE NO.: _____ FAX NO.: _____

E-MAIL ADDRESS: _____

ATTORNEY FOR: (name) _____

SUPERIOR COURT OF CALIFORNIA, COUNTY OF

STREET ADDRESS: _____

MAILING ADDRESS: _____

CITY AND ZIP CODE: _____

BRANCH NAME: _____

PETITIONER: _____

RESPONDENT: _____

PETITION FOR

☐ Dissolution (Divorce) of: ☐ Marriage ☐ Domes

☐ Legal Separation of: ☐ Marriage ☐ Domes

☐ Nullity of: ☐ Marriage ☐ Domes

1. **LEGAL RELATIONSHIP (check all that apply):**

a. ☐ We are married.

b. ☐ We are domestic partners and our domestic partnership

c. ☐ We are domestic partners and our domestic partnership

2. **RESIDENCE REQUIREMENTS (check all that apply):**

a. ☐ Petitioner ☐ Respondent has been a resident of three months immediately preceding the filing of this Pet described in items 1a and 1c must comply with this requir

b. ☐ Our domestic partnership was established in California, I to dissolve our partnership here.

FL-800 | FL-300 | FL-100 | FL-370 | FL-160

Filling in Blank Forms

1. In the **Client Information** tab, click the arrow next to the client you want, then click the matter you would like to work on for that client. This tells the program which client and matter data will be used to populate the form(s) and where the form(s) will be saved.
2. Select the blank form you want to work on for this matter by clicking on the **Forms Library** tab and finding the form you need as outlined above. By first selecting the client and matter, then finding the form in the library, the form will be populated from the client/matter profile when it opens in the **Open Forms** tab.
3. Fill in the remaining fields. If this is a multi-page form, the page number will be indicated on small tabs in the bottom right corner of the screen, as shown here in blue. Use these tabs to navigate the document.

The screenshot shows the EssentialForms application window. The top menu bar includes 'Client Information', 'Forms Library', 'Opened Forms', and 'E-filing'. The 'Opened Forms' tab is active, displaying a form titled 'FL-100'. The form is for a 'PARTY WITHOUT ATTORNEY OF ATTORNEY' and is populated with the following information:

- NAME: L.W. OFFICES OF John E. Woods SBN 999999
- FIRM NAME: L.W. OFFICES OF John E. Woods
- STREET ADDRESS: 2200 Cliff View Street, Suite 100
- CITY: Chatsworth, California 91313
- STATE: CA
- ZIP CODE: 91313
- TELEPHONE NO: (818) 200-0000
- FAX NO: (818) 200-0000
- E-MAIL ADDRESS: jhnwoods@email.com
- ATTORNEY FOR: (name)
- SUPERIOR COURT OF CALIFORNIA, COUNTY OF: SAN DIEGO
- STREET ADDRESS: 330 West Broadway
- MAILING ADDRESS: Room 225
- CITY AND ZIP CODE: San Diego, California 92101
- BRANCH NAME: CENTRAL DISTRICT

The form also includes sections for 'PETITIONER', 'RESPONDENT', and 'LEGAL RELATIONSHIP'. The 'LEGAL RELATIONSHIP' section has three options: 'We are married', 'We are domestic partners and our domestic partnership was established in California', and 'We are domestic partners and our domestic partnership was NOT established in California'. The 'RESPONSE REQUIREMENTS' section has two options: 'Petitioner Respondent has been a resident of this state for at least six months and of this county for at least three months immediately preceding the filing of this Petition' and 'Our domestic partnership was established in California. Neither of us has to be a resident or have a domicile in California'.

In the bottom right corner, there are three small tabs labeled '1', '2', and '3', indicating the form is multi-page. The first tab is highlighted in blue.

4. To print a form, simply click the **Print** icon (shown above in red).
5. Save the completed form by clicking the **Save** icon. If you add a descriptive comment for the form, a “music note” icon will appear next to the form name in the Matter folder to indicate that there is a note associated with the form.
6. Saved forms will be found under the **client name** and **matter name** in the **Client Information** tab. Clicking the arrow next to the matter name will expand the folder to show all saved forms in that matter. To open a saved form, double-click the name of the form you would like to open.

Renaming Clients, Matters, and Saved Forms

1. Find the client, matter, or form you would like to rename, right click the icon next to the item, then click “Rename” in the menu.
2. The selected client, matter, or form name field will become *active* (highlighted). Simply start typing the desired updated name. Hit the Enter key on your keyboard to save the changes.