

Use Existing Data From Database

Note: Common Sense Software Programs have Context Sensitive Help. This feature displays help for the screen you are presently on. For additional Help Topics press the Contents Button on the top left of the Help screen. Also, *if you place your cursor on any data entry field or button and hold it there for a few seconds you will see a pop up help bubble that contains addition information about that field.* This guide shows screen shots from Bates Professional. Options may vary from other Bates versions but all programs are similar in operation.

Note: If you Have Not Setup the Default Options for yourself please do so. If you understand how this part of the program works you will be able to find your Stamped Electronic Documents much easier. *By default the Bates Programs place all of your electronic production of stamped files in the Bates Program Folder.* You may review that section of the help or take a look at the Quick Start – Registration and User Setup Guide.

To Use Existing Data you must fill in the Customer Information Page if this page is left blank the information is not saved. The Client Name is the key for the Bates program to save the information about the project you are now doing in the Bates Program Database. Each User will see only there clients in the database. *ZZZ* has access to all the clients. *Users of this program have found it useful to setup regular formats in the database and change the client, label info as needed to save time when starting a new job.*

Keywords Field – This field is displayed if you are labeling a electronic file. If you enter any information in this field the properties of the electronic file will be rewritten with the information provide in this screen. If you leave the keywords blank the information from this page is saved in Bates Program Database but NOT WRITTEN to the properties of the electronic file.

Bates Professional 2006 - Customer Information

Registered to Common Sense Software

Ordered by: Joe Attorney

Date: 6/26/2006

Client Number: 1

Client Name: Jones

Keywords: Jones vs Smith - Confidential Documents

<<Previous Next>> Cancel Help

ZZZ Bates 4 x 20 (5267)

Saving the Data

After selecting Print or Cancel from the Preview page if output is to printer or upon completion of your file or scan process you will be given the opportunity to save the label information if you have filled in the Client Name Information. This information will be save to the house account (ZZZ) and the user who entered the information.

Registered to Common Sense Software

Ordered by: Joe Attorney
Date: 6/26/2006
Client Number: 1
Client Name: Jones
Starting: 1
Prefix: Jones-
Suffix:
Amount: 42
Keywords: Jones vs Smith - Confidential Documents

Save current information?

Yes No Help

Using the Saved Data

Existing Data – This input source allows the use of input data from a previous Bates Numbering production. This makes adding additional documents to a case very easy to do. The “Existing Data” selection will be grayed out if the User has not saved any data.

Registered to Common Sense Software
Allow input for stamping from a database

Client #: _____
Name: _____
Company: _____
Phone: _____

What to Label

Labels
 Paper Documents
 Electronic Documents
 Scanned Documents
 Use Existing Data
 Batch Job

<<Previous Next>> Cancel Help

When you add Client information using to the Database, information for that set of Bates Numbering is saved in a file that may be recalled by selecting "Existing Data" from Input Source Page.

The Database saves Clients for each User separately. To view all of the Clients in the Database select user "ZZZ" (the Bates House Account), this lists Clients for all users. If the "Database" button is grayed out, you have not saved any Clients for the current user.

You will see an alphabetical listing of your clients. Use the arrow keys to highlight the client you would like to review. The original information you filled in will appear on the right side with the setup for that Client in the bottom right window.

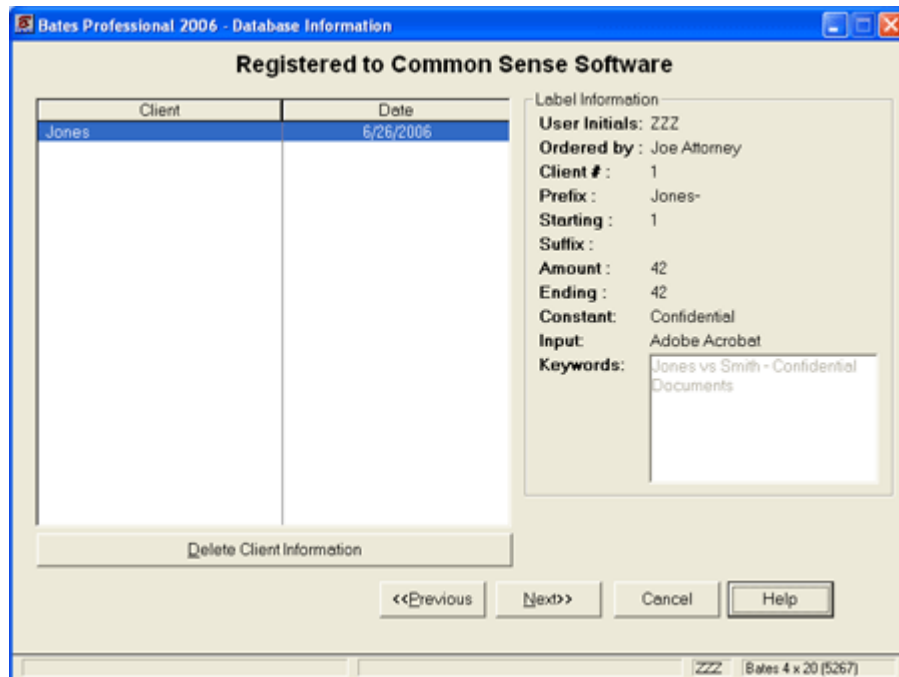
You may now Reprint a set of labels to continue a job listed in your database. To do so, highlight the name of the client and select next.

If printing Electronic Documents as we are doing in this guide you are taken to the File Input Page. Add the next file or files that you want to process and press Next.

If printing a Paper Document you will go to the Label Type Page, the program takes you the next page you need for the type of project you are working on.

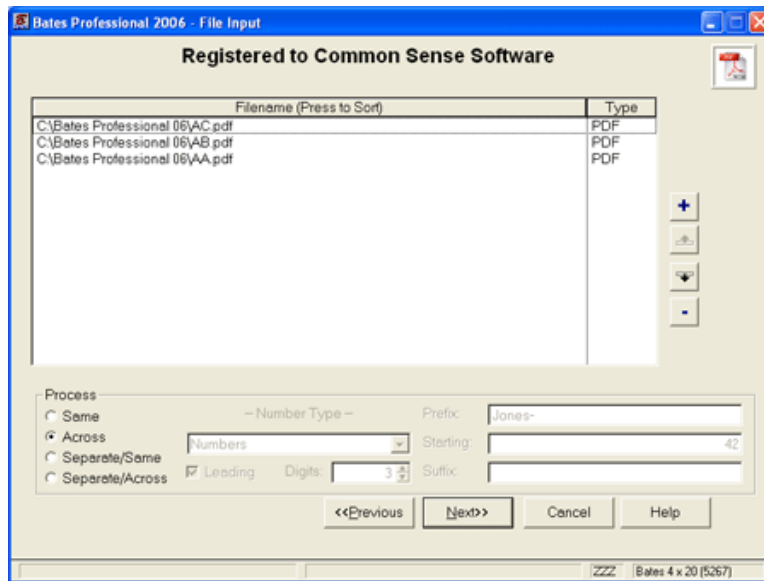
If you want to delete a client, highlight the client and click delete.

Press Next to continue.

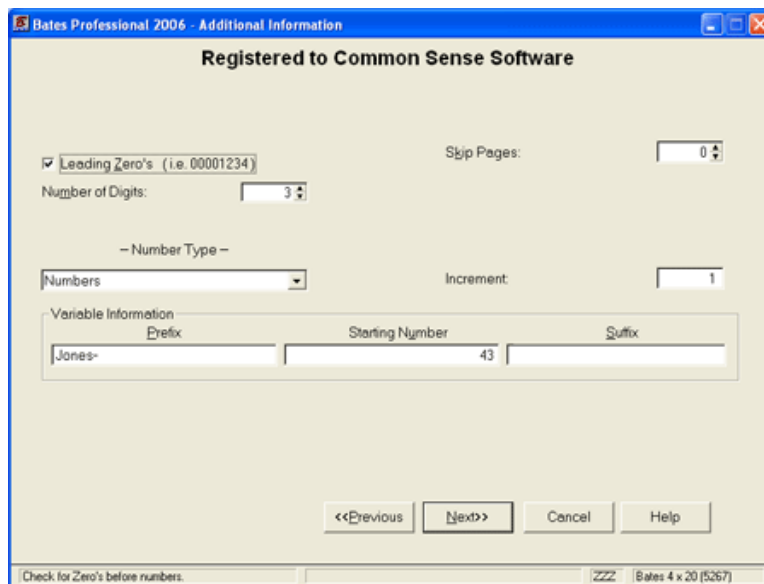


As you progress the screens all the fields from the selected job will be filled in.

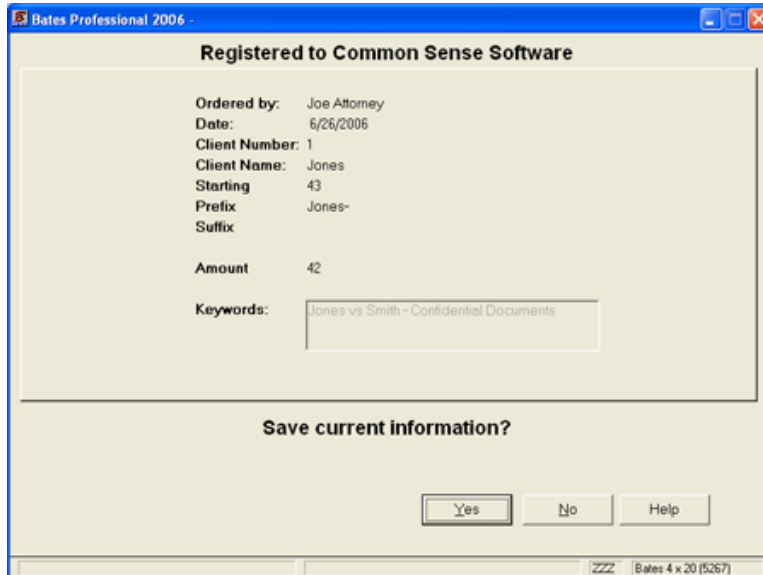
In Electronic Document processing you are taken to the Input File page. We put the part of the information from the Database page in the Separate Variable block so if you get interrupted you will know where you are. You may also change any of the saved data when you go though the screens. Press Next to continue through the screens.



Notice that the next number for your job is filled in for you and all the other fields are as before. Press next to continue through the screens.



You will be asked if you want to save the Data again after processing the job.



When you continue the job by selecting Use Existing Data you will find this last job listed directly below the first job you did and so on. Database storage is recommended as long as a case is open. When finished with it you can delete the information for that client. *Users of this program have found it useful to setup regular formats in the database and change the client, label info as needed to save time when starting a new job.*

