

YreType Letter

- From Word's menu bar select YreType, Letter
- Current Date is automatically selected
- To change date, click on drop down arrow and select appropriate date on calendar
- Enter Recipient information directly into the fields
--- or ---
- Right mouse click on contact name under Names and Addresses and select Insert Address
- Select Envelope or Label
- Click on the drop down arrow and select the Salutation or enter directly
- Click on the drop down arrow to select the Delivery Type or enter directly
- Select Enclosure /Attachments by clicking on the drop down arrow
- Enter Re: line or scroll through the previous 10 Re: lines
- Enter cc: or bcc: names directly
--- or ---
- Right mouse click on contact name under Names and Addresses and select Add to cc:/bcc:
- Enter information directly in Sender Profile fields or select from the last 10 Sender profiles
- Click on OK to create letter

YreType Memo

- From Word's menu bar select YreType, Memo
- Current Date is automatically selected

- To change date, click on drop down arrow and select appropriate date on calendar
- Enter Recipient information directly into the fields
--- or ---
- Right mouse click on contact name under Names and Addresses and select Insert Address
- If there is more than one Recipient, right mouse click on contact name under Names and Addresses and select Add to Additional Recipients
- Enter the Subject directly in the field
- Enter cc: or bcc: names directly
--- or ---
- Right mouse click on contact name under Names and Addresses and select Add to cc:/bcc:
- Enter information directly in Sender Profile fields or select from the last 10 Sender profiles
- Click on OK to create memo

YreType Fax

- From Word's menu bar select YreType, Fax
- Current Date is automatically selected
- To change date, click on drop down arrow and select appropriate date on calendar
- Enter Recipient information directly into the fields
-- or ---
- Right mouse click on contact name under Names and Addresses and select Insert Address
- If there is more than one Recipient, right mouse click on contact name under

Names and Addresses and select Add to Additional Recipients

- Enter the number of pages
- Select /deselect if the Original Not Follow. If the Original will be sent, select the appropriate delivery method or enter directly in the Other field
- Enter the client/matter reference
- Enter information directly in Sender Profile fields or select from the last 10 Sender profiles
- Click on OK to create fax cover sheet

YreType Envelope/Label

- From Word's menu bar select YreType, Envelope/Label
- Enter Recipient information directly into the fields
-- or ---
- Right mouse click on contact name under Names and Addresses and select Insert Address
- If there is more than one Recipient, right mouse click on contact name under Names and Addresses and select Add to Additional Recipients
- Select Envelope or Label
- Click on OK to create envelope/label

YreType Court Pleadings

- From Word's menu bar select YreType, Bankruptcy Court Caption/Common Pleas Court Caption/US District Court Caption/US District Court Caption – CA Paper. When form is complete click on OK to create Court Caption.

Bankruptcy Court Caption

- Current Date is automatically selected
- To change date, click on drop down arrow and select appropriate date on calendar
- Click on drop down arrow to select District and Division
- Enter the Case No. and Adversary No. information directly in the fields
- Click on the drop down arrow to select from a list for Chapter, Bankruptcy Number, Pleading Title, and Client Name
- Click on the drop down arrows to select In Re:/Plaintiff/Defendant
- Enter information directly in Sender Profile fields or select from the last 10 Sender profiles

Common Pleas Court Caption

- Enter Attorney Name and ID or select Add/Remove buttons as necessary
- Select additional attorneys if listed under Previous Profiles
- Enter Court Term and Court Number
- Click on the drop down arrow at the For: field to select Attorney representation type
- Click on drop down arrow to select Pleading Title, File Number, Client Name and Closing
- Select Jury Trial Demanded/Class Action/ Arbitration Case/Assessment Required/ Cover Sheet
- Click on the drop down arrow and select Plaintiff/Plaintiffs or Defendant/Defendants
- Enter the parties names in the appropriate fields or click to select from the last 10 used

US District Court Caption

- Click on drop down arrow to select Attorney For, District, and Pleading Title
- Enter Civil Action Number and select Jury Trial Demanded or Class Action
- Click on drop down arrow to select District and Division
- Click on the drop down arrow and select Plaintiff/Plaintiffs or Defendant/Defendants
- Enter the parties names in the appropriate fields or click to select from the last 10 used
- Enter information directly in Sender Profile fields or select from the last 10 Sender profiles

US District Court Caption – CA Paper

Select this option to have your document formatted on California Paper. Follow the same steps listed for US District Court Caption

QUICK TIPS

- Use the Tab key to move from field to field
- Use the Enter key to move through a table
- First time Recipients can be added to the Contact List by clicking on the Add to Contact button
- Letters can have up to 3 Recipients
- Contact information can be edited by right mouse clicking and selecting Edit Contact
- Click on the Options button to select or change your default template
- Click on the + sign to expand Contacts and Previous Address (last 10 remembered)
- To print without Smart DocID select File, Print Without Smart DocID



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YreType 5.0 Document Automation Suite



Quick Reference Card

