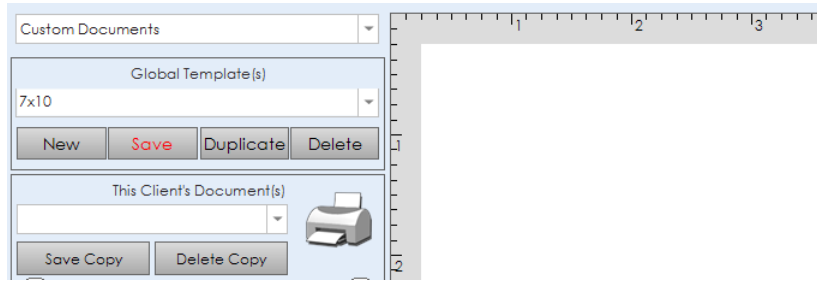


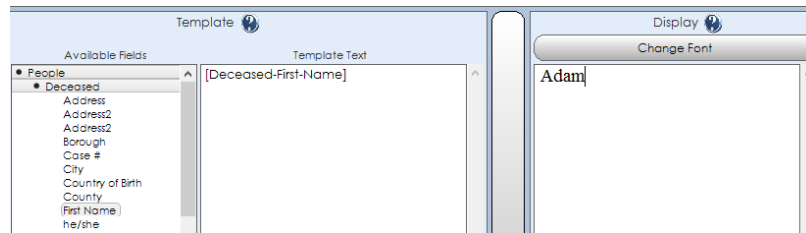
# Custom Documents

In Custom Documents, you're able to create ANY form or report that can also populate case information. Have a ruler handy for this section if you're recreating a form!



Simply measure out on the form where each line or text should fall. Use the rulers on the screen to place the line or text where it appears on your physical form.

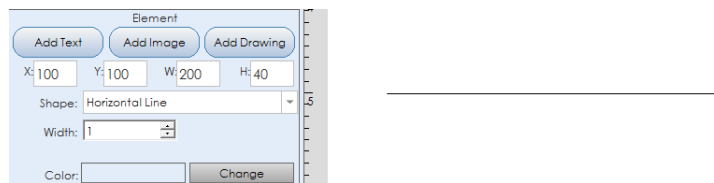
To add text: Click Add Text. To edit existing text on your page, double click on the text and a box will pop up. The left side offers available text fields that can set to automatically insert on the document. There is about every single text field you've typed on a person's case available.



So, for example, if you want the deceased's First Name and Last Name to populate, simply place your cursor where you want the text to appear and find the section for Deceased. Notice that if you single click, it defines what will populate on this case. If you double click, it places it to be merged on the template.

The middle box is where you can type any text and any merge fields. Click the arrow button in the middle of these boxes to see information populate. You can edit the font and font size. Click done when you're finished. You can resize and adjust the text box you created by clicking on it, drag the right bottom corner of the box, and resizing.

To add lines for forms: Click Add Drawing. From the dropdown, select the horizontal line. Here, you can drag and drop the line where it falls on your form. This is where you will need your ruler.



Continue adding text and lines until your custom document is finished!