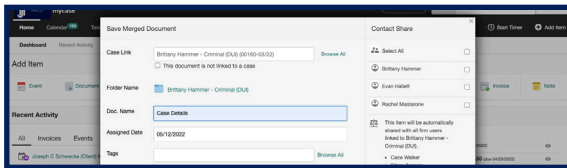
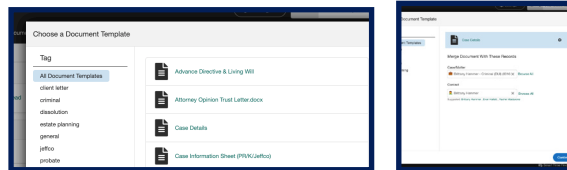
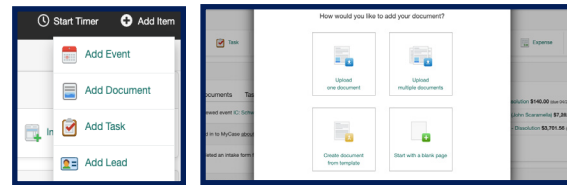


This is just a quick instructional guide on generating a form document. For most if not every case I have drafted many form documents that pull details from the case information and generate the document for you. From fee agreements to the accounting for a probate case, all these documents can be created for you in just a few clicks. Follow the steps below to see how to keep that process ticking along! You can also watch this guide here: [joneslawcolorado.com/dashboard](https://joneslawcolorado.com/dashboard)

## Steps to Follow

- From Anywhere: Click add item and add document. Then click document from template.
- Fill the client name and case name in, select the document, and click continue.
- Name the document and then click save and open. You'll be able to edit and review the document.
- You'll want to review the document to ensure everything is correct.
- That's that! Good job!



## Concluding Thoughts

These documents help so much! It means we can have regulated drafts that are uniform across every client and no one has to worry about digging up an old draft of a motion from a case we barely remember. Now we can just directly generate them. Forms lead to generated documents and generated documents lead to really effective workflows where even the creation of the document can be automated. So, send people forms to fill out, and, generate documents to keep our cases uniform.