

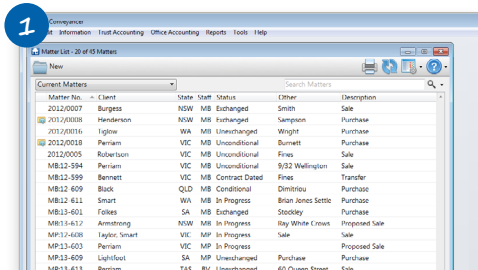
### 3. Creating Documents

How to create a variety of documents in LEAP Conveyancer including letters, forms and emails.

[www.leapconveyancer.com.au/training](http://www.leapconveyancer.com.au/training)

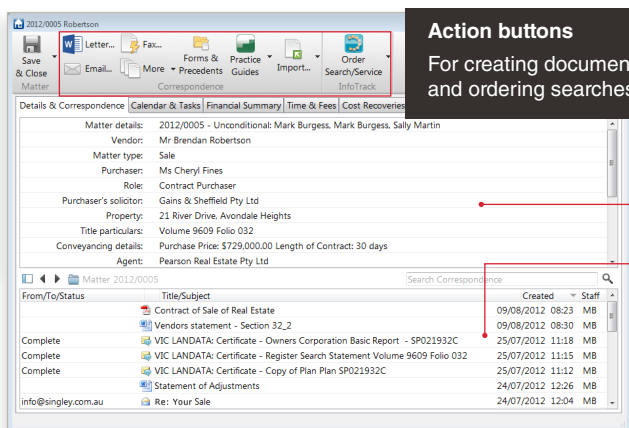
Open the Matter, click the relevant button.  
Create and work with:

- Letters
- Forms & Precedents
- Email



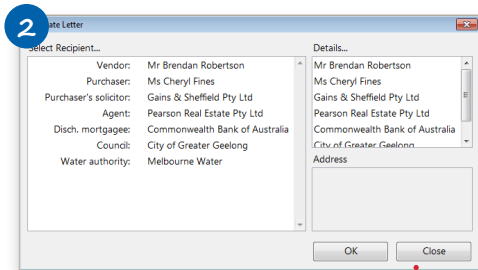
#### Matter List window

A searchable list of Matters with different list views in the drop-down list. Double-click the Matter to open.



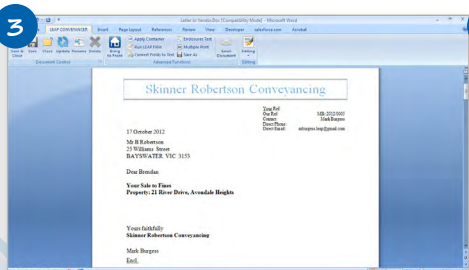
**Action buttons**  
For creating documents and ordering searches.

**(Sale) Matter window**  
Top: Vendor, Purchaser, Agent and important property details.  
Bottom: All the documents, Searches and emails associated with the Matter.



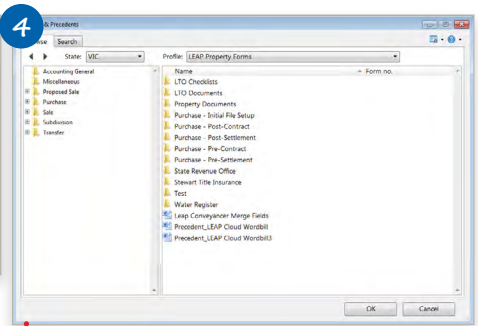
#### Letters (1)

Click **Letter...** on the toolbar, and select the party and recipient. Click OK.



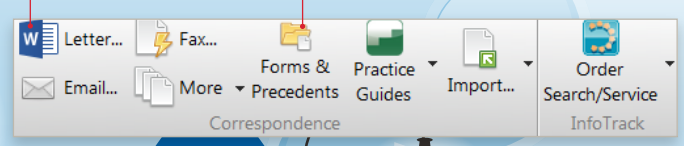
#### Letters (2)

Client details will be merged into the letter in Microsoft Word. Type your letter content, and click **Save & Close** to save the letter back to the Matter.

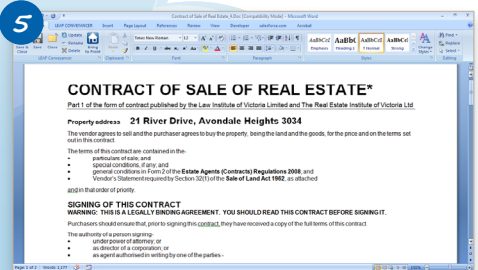


#### Forms & Precedents (1)

Click **Forms & Precedents** on the toolbar, and navigate to the folder for the stage of the Matter you are working in and select the required form.



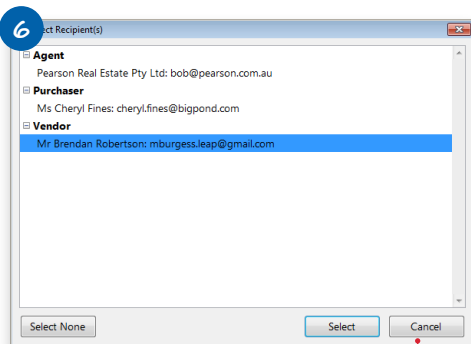
**Alt + F9**  
To toggle between field codes and your data.



#### Forms & Precedents (2)

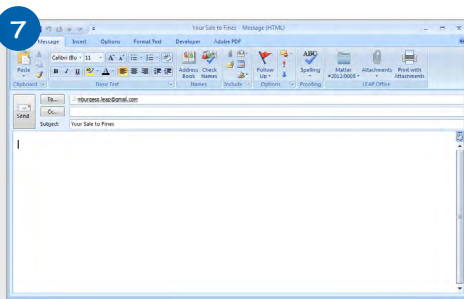
Type your form content, and click **Save & Close** to save the letter back to the Matter with the name of the precedent.





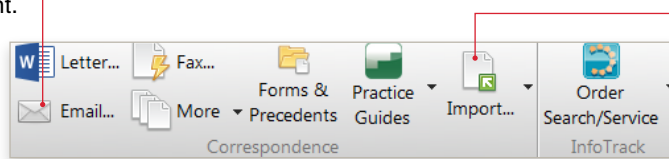
### Email (1)

Click **Email** on the toolbar, and select the party and recipient. Or right-click a recipient or document.



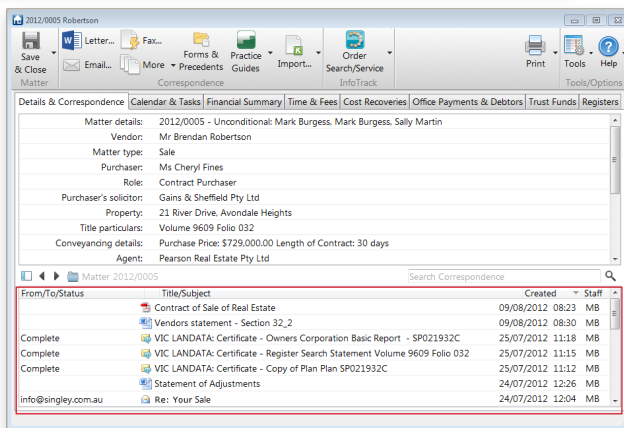
### Email (2)

Type your message and click **Send** to send the email and save it back to the Matter as well as in your Outlook Sent folder.



### Import

Use to import your existing documents to the Matter.

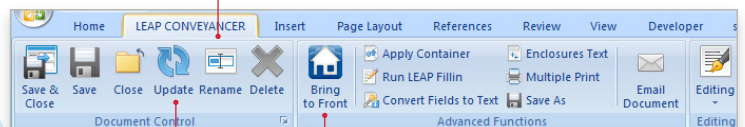


### Matter window

All the documents, Searches and emails associated with the Matter are listed at the bottom of the Matter.


### The LEAP Office tab in Microsoft Word:

Rename the letter



Update details from LEAP Conveyancer

Bring LEAP Conveyancer to the front.

 **Bring to Front**

If you notice in your Word document or form many details are blank, it's best to jump back to LEAP Conveyancer, fill in all relevant Matter details, then go back to Word.

To jump back to LEAP Conveyancer from Word click **Bring to Front** on the LEAP Office tab.

