

Document Bundling Manual

This manual is designed to help you and your team understand the process of bundling documents in OnePractice.



Document Bundling

Our document bundling solution will allow you to select multiple documents from within a matter and bundle these together into one combined PDF file.

Creating a bundle of documents in OnePractice can be done by selecting multiple documents (holding down your Control key and selecting with your mouse or arrows) and clicking Bundle in the ribbon or from the right-click menu (see Figures 1 and 2 below).

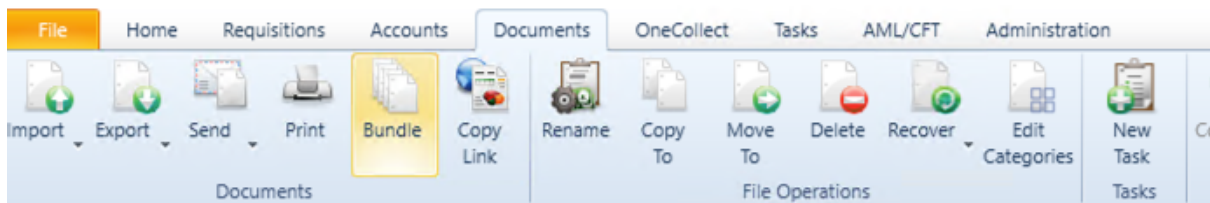


Figure 1.

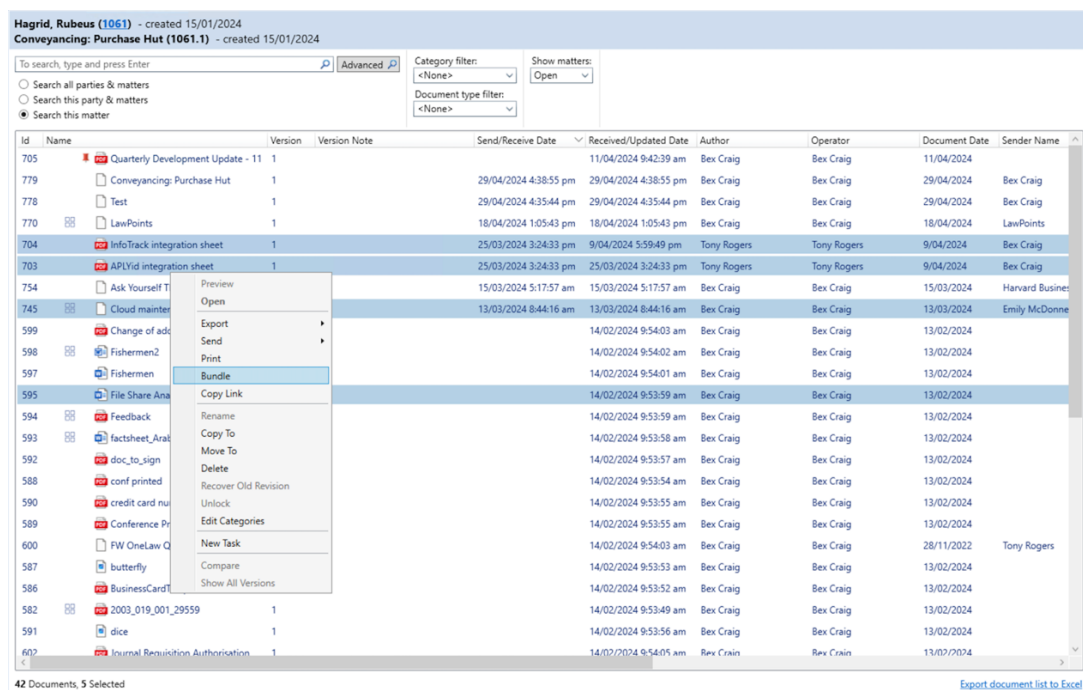


Figure 2.

This will now give you several options to customise the bundle of documents and complete a number of actions before continuing.

Once the bundling process has commenced there are a few additional actions you can complete to customise this further as follows:

- + Rename the bundle in the Bundle name field. The default will be Bundle Document
- + Remove documents by selecting the red minus button(s)

- + Add documents via the green plus button. This will allow you to select documents from across OnePractice, not just the matter you created this from
- + Rearrange the documents into a different order. The default order will be the order you selected the documents in. These can be rearranged by dragging the green arrows

Bundle Actions

Within the Bundle Documents screen there are multiple actions as follows:

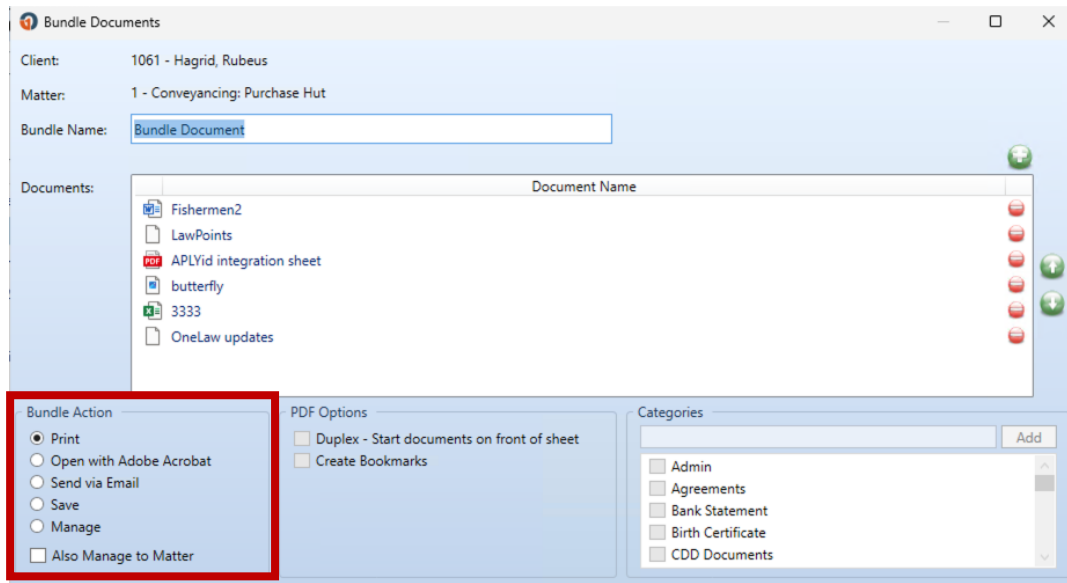


Figure 3.

- + Print
- + Open with. This will populate with your default PDF viewer e.g. Open with Adobe Acrobat
- + Send via Email
- + Save. This will give you the option to save to your local disk
- + Manage. This is an option by itself, however, you can select any of the above options and tick Also Manage to Matter below

PDF Options

We have also included a couple of options for presentation once the bundle has been exported to PDF and/or ready to print:

- + Duplex. This will set the separate documents to start on an odd page, meaning there will be no blank sheets if you choose to print the document double-sided
- + Create bookmarks. We have included this option so that the names of other separate documents can be updated without impacting the document name within OnePractice. Selecting this will allow editing of the Document name (see Figure 4 below) and these will show in your PDF viewer as bookmarks (see Figure 5 below)

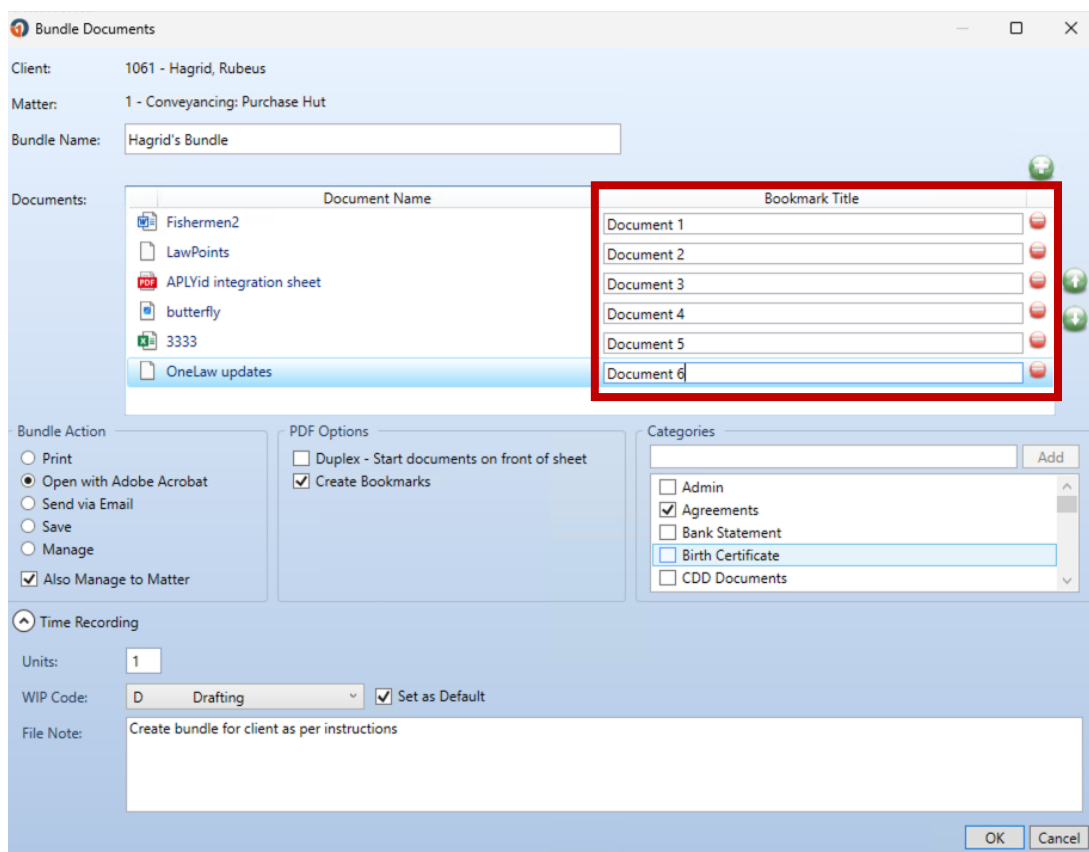


Figure 4.

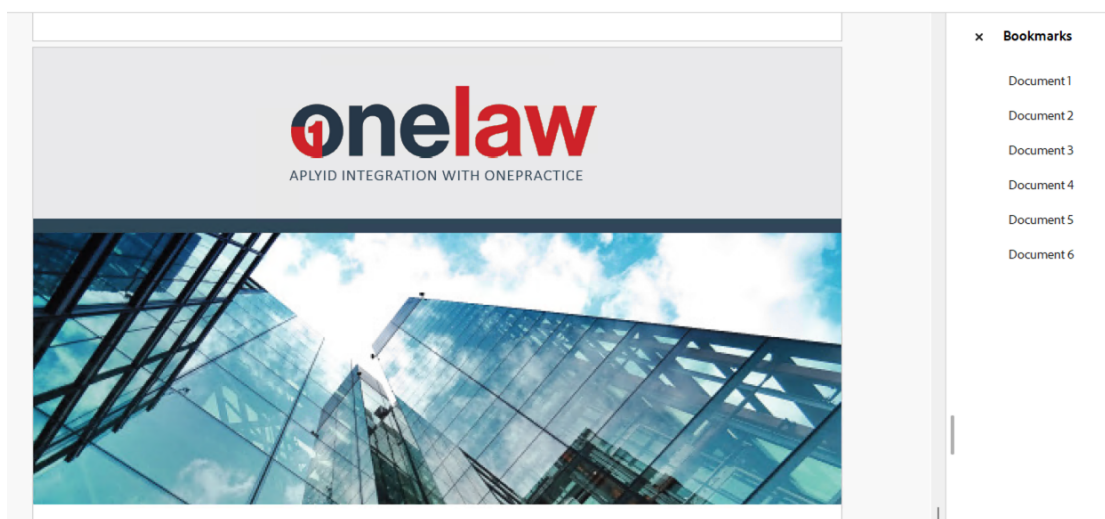


Figure 5.

Finalising the Bundle

Prior to selecting 'OK' on your bundle, there are also the options to add categories (existing or new), and time record (see Figure 4 above).