4 Finalizing Your Document

This is chapter provides information on how to finalize your documents once they're complete. Here you'll find document signing instructions and other information to help you ensure your documents are complete and legally valid.

NOTE: You'll find detailed information on all the documents you want to produce in the online Legal Guide. It also contains definitions of legal terms. You can access the Legal Guide from the Help menu, the tool bar, or by pressing **Ctrl+F1** from most program locations.

Making Your Documents Legal

When you reach the end of a document, the Make It Legal screen (see Figure 4-1) appears presenting options available for finalizing your document.
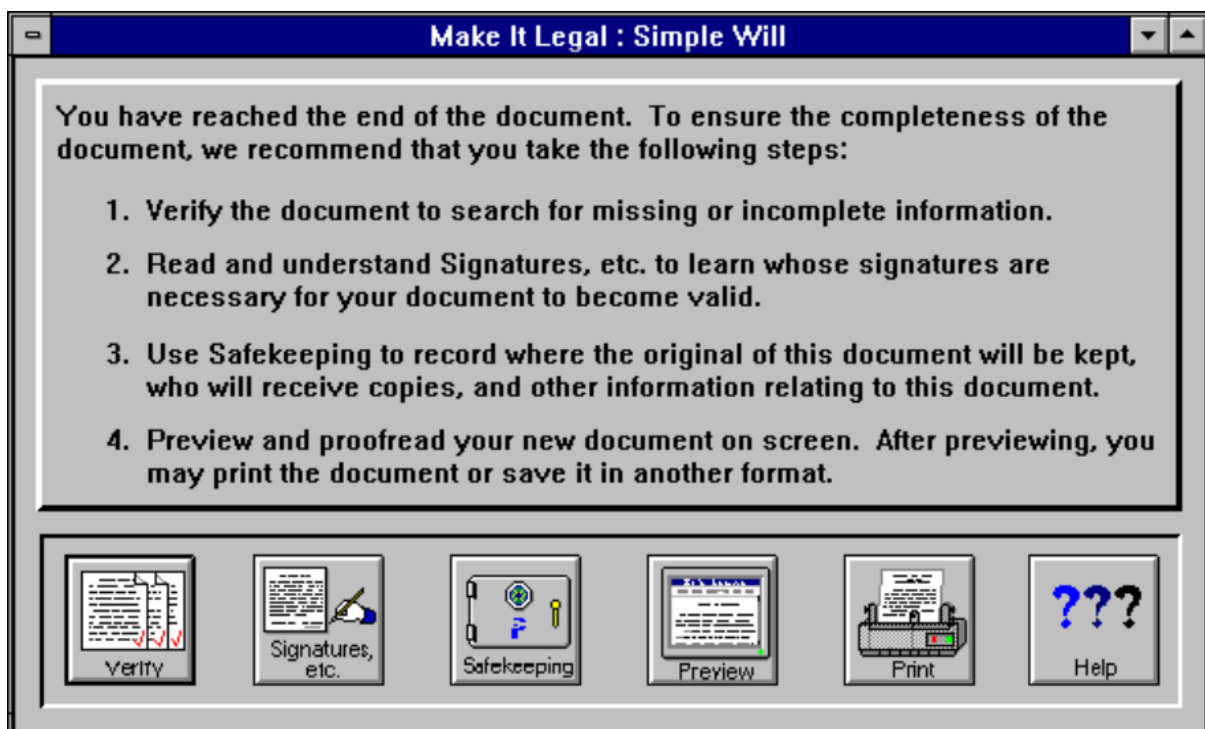

Figure 4-1. Make It Legal Screen

You should follow the step-by-step instructions shown in Figure 4-1 to ensure the completeness and accuracy of your legal documents. As you complete each step, **It's Legal** inserts a checkmark before that option so you know what's left to do. When you've completed all four steps, you are ready to print your document. If you need further assistance before printing, you can click the

Help button on the Make It Legal screen to access online Program Information Help. When you are ready to generate a hard copy of your legal document, click the Print button.

You can also access the Make It Legal screen from anywhere in a document by choosing Finalizing Document from the Document menu, then Make It Legal from the submenu that appears. The rest of this chapter outlines each of the options available from the Make It Legal screen. See the appropriate section below for more information.

Verifying Your Document

The verify process searches a document for missing data entries in any required or checked optional sections. Verification is a good way to ensure your document contains all the data necessary to make it legally valid. You will most likely perform this process when you reach the end of the document.

NOTE: You can verify at any time, but if you're using the Interview, the program will switch to the Template method before proceeding.

You do not have to verify a document before printing or previewing it. In some instances, you may choose not to verify. For example, you might be creating a "form" document that *should* contain incomplete data entries.

You can verify data in an activate document by clicking the Verify button on the Make It Legal screen (see page 4-1) or on the tool bar. A Verify box appears as **It's Legal** checks the document. If incomplete data is found, another Verify dialog appears notifying you of the omission. The cursor appears on the field in question where you can enter the appropriate information. (Note that the Verify dialog remains open, and you can move it to view more of the document, if needed.) To resume verification, click the Continue button on the Verify dialog (or press **Enter** or **F5**). The program notifies you when all sections have been checked.

Signing Your Document

In order for a document to be legally valid, it must be properly signed and notarized (if necessary). Not all documents must be notarized, but in some cases you may want to do so. Because signing a legal document is so important, you'll want to carefully review the signing instructions found in the Legal Guide for *EVERY* document you create.

You can access the signing instructions for a document you currently have open on screen by clicking the Signatures, Etc. button on the Make It Legal screen (see page 4-1). You can also access these instructions at any point in the document by choosing Finalizing Document from the Document menu, then View Signatures, etc. from the submenu that appears. When you've finished reading the information, close the Legal Guide to return to your document.

Safekeeping Your Document

Because many people store their important legal documents in a special place (like a safety

deposit box), **It's Legal** provides an additional section in each document for safekeeping information. In this optional safekeeping section, you can indicate where you plan to store the document and record other pertinent information. When you print the document, the safekeeping information will print on a separate page so others can be notified of the document's location.

To access the safekeeping section for a document you currently have open on screen, click the Safekeeping button on the Make It Legal screen (see page 4-1). You can also access this section by choosing Finalizing Document from the Document menu, then Document Safekeeping from the submenu that appears. If you're using the Interview, the program will switch to the Template method before proceeding.

When the Safekeeping section opens, click the first check box and complete the appropriate fields. When you are finished, use the Control-menu box to close the section and return to your document or the Make It Legal screen. (See your Windows manual for details on using the Control-menu box.)

Previewing Your Document

The Preview feature shows how your document would look if printed at any point. You can preview a document at any time while creating or editing a document. However, you cannot enter or edit data from the preview feature.

To preview an active document, click the Preview button on the Make It Legal screen (see page 4-1) or choose Preview from the File menu. A Building document data message appears while **It's Legal** arranges the document, and then the preview screen opens. From the preview screen, you can:

  * Change the font for the entire document.
  * Modify the display attributes.
  * Zoom in or out of the document.
  * Jump to another page.
  * Print all or part of the document.

Previewed documents consist of all required sections and any optional sections that you included. Preview text appears in two colors, so you can identify your data entries from the text provided by the program.

Printing Your Document

The print feature allows you to print a complete document, a document with incomplete data (underlines will appear for blank fields), or a document with no data (perhaps to use as a form).

To print an active document, do one of the following:

  * Click the Print button on the Make It Legal screen (see page 4-1).
  * Choose Print from the File menu.

* Click Print on the tool bar.

If you have not yet verified the document, a message dialog appears where you can click Yes to verify the document or click No to skip verification and print the document. If you verify the document, you'll need to reselect the Print option.

A Print dialog appears where you can change the printer setup, the font for the entire document, or the print options. When all print settings are correct, click OK to print the document. For details on printing procedures, refer to online Program Information Help (**F1**).

NOTE: Font sizes 10 and 12 yield the best results for printed documents. Larger and smaller sizes may adversely affect column formatting and signature blocks so they appear out of alignment.

Print Options

If you want your document to be double spaced or print on letterhead, for example, choose Print Options from the File menu. (You can also modify print options by clicking the Options button on the Print dialog.) On the Options dialog that opens, you can mark your choices by clicking the appropriate check boxes. After marking your choices, click OK to return to your document. Because print options are saved each time you save the document, you'll need to resave the document to retain your print option selections.

Printer Setup

Choosing Print Setup from the File menu opens the Print Setup dialog where you can select the printer you plan to use for printing your legal documents. By default, **It's Legal** uses the default printer you have set up in Windows. But you can select another printer from the list of printers you currently have installed in Windows if you wish. To install additional printers, see your Windows manual.

Modifying a Document's Fixed Text

Occasionally, you may wish to make minor changes in the fixed text of a document (that portion you cannot alter in **Its Legal**). To do so, you can save any document as a text file, and then edit the file using your word processor or the Windows Notepad (accessed from **It's Legal** by choosing Notepad from the Tools menu).

To save a document as a text file in **It's Legal**, select Save As from the File menu. Enter a name of up to 8 characters for the file on the Save As dialog. Then select the file type Text w/o CR(*.TXT) and click on OK. For further details on modifying a document's fixed text, press **F1**.

NOTE: Altering a document's fixed text may affect the validity of the document. You may want to consult a lawyer if significant changes are made.