



User Guide

BundlePro helps you create professional, presentable, and searchable PDF bundles and packets in minutes, not hours!



Registering your Firm

To use BundlePro, the first step is to register your firm.

- Open any matter and click on the BundlePro icon in the ribbon from the Details & Correspondence tab
- Enter firm details
- Enter payment details

You are now ready to start using BundlePro!

Generating a Bundle

- To create a bundle, open the relevant matter
- In the Details & Correspondence Tab, click **BundlePro**
- Check the matter code and client name are correct, then click **Create Bundle**

You will now be directed to the BundlePro Workspace

- Add sections to your bundle by clicking the **Create Sections** button
- Name sections by double-clicking the section title
- Add files by selecting the relevant section and clicking **Add Files** (choose to import from LEAP or your computer)
- Select the file(s) to add to the bundle
- Click the **Import To** dropdown and select the section
- Click **Add Files**

*A green check appears when a file has been added to BundlePro. You can also select **Hide Previously Imported files**.*

- When you finish adding files and folders, click **Close** to return to the Workspace
- Click the magnifying glass to preview individual documents
- Rename documents by double-clicking in the document title
- Click **Generate** from the menu to create your bundle

Bundle Options:

- **Bundle Comments** are extended descriptions
- **Optimize Content Size** reduces the file size of the bundle
- **Generate Without Documents** will generate only the index page
- **Generate With Late Insert Documents Only** will generate only those documents added to the bundle and marked as late inserts

- **Insert Vacat Pages** inserts a left page with the text “this page is intentionally left blank” of new volumes, sections, and documents
- **Create an OCR version** creates a text-searchable bundle
- **Create Separate Bundles** will split the bundle by volumes
- When your settings are correct, click **OK** to generate your bundle

Once your bundle is generated, click **Preview** in the menu to preview your bundle.

Settings

Bundle Settings

- **Structure:** Select to include a Title Page, a custom Introduction Page, and an autogenerated Index Page
- **Indexes:** Set the indexes name, date format, date header, page header, or page format. Set page number formatting for Section and Volume Indexes
- **Title Pages:** Set page number formatting for Volume and Section Title Pages
- **Volumes:** Use volumes to split larger bundles into smaller parts, called volumes
 - Set the maximum size, in pages
 - Include a volume title page
 - Include a volume index page
 - Set restart page numbers for each volume
- **Sections:** Show or hide section numbers, set the section number style—Numeric or Alphabetical—and set the section start number
- **Documents:** Include a document description which appears at the top of every page in the bundle. Also, set the description position, font size and color
- **Document Numbers:** Show or hide document numbers, set restarting numbers, Late insert format, and Late insert separators
- **Page Numbers:** Set the page number format, restarting page numbers, page number font size and color, page number position, and the page number start number. You also set Late insert format, and Late insert separators
- **Bates Numbering:** Set the number of leading digits, the prefix source and suffix source. If Suffix and/or Prefix Source is set to Custom, add the custom text
- **Watermarks:** Show or hide watermarks, set the watermark font size and color, position, rotation, opacity, text, image, and image scale

Click **Save** to save Bundle Settings.

Section Settings

- Include a section title page or index page
- Set the section color
- Show excluded documents
- Show document dates
- Show document times

Document Settings

- Show the document on indexes
- Label the document a simple insert, late insert, strikeout, or exclude the document
- Replace the document's date/time with custom text

Move Documents and Edit Pages

Move Documents

- To move documents or sections, simply click and drag to the correct position

Edit Pages

- Select a section
- Click **Edit Pages** in the menu
- An image of each page will appear
- Copy, cut, paste to left, paste to right, exclude, or delete pages
- Show or hide excluded pages
- Add a blank page by dragging and dropping the plus sign page icon. This can be used as a placeholder.
- Add a new document
- Click **Back** to return to the Workspace

Download – Import to LEAP

To download your bundle, click **Download** and choose from the following options:

- Preview
- Import to LEAP
- Download
- Delete generated bundle

A new expense recovery will also be posted to the matter.