



THE PATHAGORAS BEGINNER'S GUIDE

*Everything you need to know
(and do) to create your first
document assembly project.*

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**Document Assembly
Document Automation
Document Management**

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One Page Quick Start Guide

Insert variables into document for automated replacement.

Open the document that you wish to 'Pathogorize.' We will call this document the 'source' (original) document. Put [square brackets] around each word or short phrase that you want to serve as a 'variable.' (A variable is a 'holding place' for what later will be personal text. E.g.: [Client Name].)

Create multiple choice variables in a similar fashion. Listing all choices within the square brackets (as above), but separate each choice with a forward (/) slash. (See examples below.)

Enclose text that you want to be "optional" within {curly braces }. (See examples below.)

Close and save the document into an appropriate forms folder.

Hints & Tips:

The variable should have a 'variable sounding,' reasonably descriptive name. "[Date of Letter]" is more meaningful than just "[date]". Use "[Name of Customer]" instead of plain "[Name]".

Don't save source document with .dot (template) extensions. Use standard .doc extensions. 'Plain' documents are much easier to work with.

Example:

This is an example of a 'Pathogorized' letter:

Dear [Customer Name].

Thank you for your order placed on [date of order] for [quantity] [red/blue/assorted] [product name].

We will ship your order within 5 business days.

{Please note. Due to the special pricing of these items, all sales are final.}

[Sales Representative Name]

Assign data to variables

Open or create the document that contains variables. Press Alt-D (for 'Database') to display the Instant Database screen. (It is called Instant Database because you will be able to instantly save the variable to data pairings to a database for reuse with other documents.)

Type for each variable the appropriate value into the textboxes. If you have created multiple choice variables, select from drop-down list. Press the Tab key to move to the next variable.

You may have several pages worth of variables. Press the numbered buttons at the top of the screen to move from page to page. Press the '>' button to display addition pages beyond 4.

Press the 'Next' button when finished. You need not complete all variables. You can run Instant Database at a later time to fill in the remaining variables.

Libraries & Books

You should never use the original source text for creating a personal document. You should only use a copy of the source text.

Pathogoras makes it easy to implement this rule. Pathogoras' 'Libraries & Books' and 'DropDown List' modules allow you this protection in a simple, but very elegant style. Read more about these tools in the [Your First System](#) ^[11] pages of this Guide.

Creating a New Document:

1. Click the Document Assembly button.
2. Click the radio button on the line of the book from which clauses are to be drawn.
3. Click 'Next'.
4. Choose the clauses/documents you wish to assemble from the left column and move them to the right.
5. Click 'Next'.
6. Press Alt-D to bring up the Instant Database screen.
7. Press the Scan button to read the variables.
8. Type a value to replace the variable.
9. Click 'Next'.
10. You are done!



Pathogoras contains many features, options, buttons and alternative ways to accomplish any goal you set. (This is similar to the program it augments, Microsoft® Word.) Do not be overwhelmed by this. The above steps will get you into the meat of the program. The rest of this Manual will show you more of the program's features. Once you feel comfortable with the basics, then explore the remaining program features.

'Pathagorizing' Your First Document

This Beginner's Guide is intended to give you a meaningful hands-on experience in the basics of the program. It has been specially tailored to give you the most bang for the buck (the 'buck' here being time). The lessons are a bit 'out of order' from the way we typically demonstrate the program, but they nevertheless will accomplish the intended goal.

First, we will show you how to 'Pathagorize' a form. You will create 'variables' and 'optional text blocks' in a source document. We will also ask you to create several building blocks of 'Pathagorized' text and, with those building blocks, we will show you how to 'assemble' a complete document.

We start each section with some brief explanations and definitions. Then we ask you to practice the lesson by following the steps identified by "**Your Turn**:".

It should take you less than 90 minutes to complete the below exercises. If the document with which you are working contains a lot of potential variables, stop 'Pathagorizing' after about 5 minutes. That way you can move on with the lesson and stay within the time boundaries. (With Pathagoras, it is easy to pick up where you left off.)

Pathagoras' "plain text" foundation allows anyone, regardless of prior word processing experience, to create a fully functional, automated forms in very little time. Please note the following basic information about 'Pathagorizing' a form:

- You will use only standard keys and keystrokes to create the 'automation' sections. (Indeed, you do not need Pathagoras installed on your computer in order to prepare a document that Pathagoras can use.)
- No hidden fields or behind-the-scenes codes are used to 'Pathagorize' a form. Everything is facial to (visible on) the document.
- There is no programming required. We promise!

We think this Beginner's Guide is a wonderful way to learn the basics of Pathagoras. However, when there just isn't 'enough time' to devote more than a few minutes a day to learning Pathagoras, we offer an alternative approach. Take a look at "[The Pathagoras 7-Day Plan](#)." This pamphlet requires but "15 minutes a day," taking you through one short daily exercise for a week. If time is not your friend today, check it out.

Definition: A '*source document*' is any text that you (and Pathagoras) will use to create the initial draft of a document during a document assembly session. We refer to '*source document*' frequently in the next pages.

2.1 Adding Variables

Definition: A '*variable*' is simply a place holder. It is used reserve space for personal data to be inserted later on. At document assembly time, variables are replaced with personal or client/


customer specific information so that the final product is highly personalized for the client, customer or patient.

This 'replacement' process can be made 'automatic' in Pathagoras. The only requirement is that the various document variables must be enclosed within plain text, square brackets. [This is a variable.]

Your turn:

1. Open the document you want to 'Pathagorize.' Look for 'personal data' in the document. We are talking about names, addresses, dates, quantities, colors, etc. Anything that is likely to be different from one completed document to the next.
2. Surround each item of 'personal data' with [square brackets]. Then, convert the text now between the brackets to more 'variable sounding' names. So John Doe in the original would first become "[John Doe]". Then, you would change it to something like "[Customer Name]"; "1221 Main Street" becomes "[1221 Main Street]" and then something like "[Customer Street Address1]" , etc.

That is it. The text now within the [square brackets] are automated variables. In a later document assembly exercise, you will see how, in just a few clicks of the mouse, Pathagoras will take these variables and place them onto an easy to complete input form.

 Pathagoras offers a full range of tools to automate the 'variable creation' process described above. The manual method which we describe above demonstrates how simple the process really is. But when you have lots of replacements to make, you will want to know about the automated methods available. When you are ready, check out the ['Create Variables' Assistant](#). This link will take you to the main Help Manual, with the page turned to the appropriate topic. But for now, let's stick with the manual method.

Testing your work:

While we never want you to work on your original documents, it is inevitable as you are testing what you have created. So, we start with a warning. Before testing, save your work in progress.

Alternatively, and this is a strong recommendation, copy the section of text you want to test to a new document. Test using that copied text.

With the text you want to test on screen, press the key combination <Alt-D>. This will call up the Instant Database screen.

If AutoScan is on, your bracketed variables will automatically populate the screen. Otherwise, click the Scan button.

Provide replacement values for each listed variable (or just a few of them, since you are just testing).

Click the Next>> button. Pathagoras will quickly replace the variables with the values you provided.

Review the results. DO NOT SAVE this now changed document. To fix what may need fixing, close without saving the document. Reopen the last saved version and make corrections.

In actual production use, Pathagoras will always present a copy of the source text, never the

original. Overwriting an original is not a concern. But as you are testing your setup, you likely will be working from the original. Hence this additional warning.

2.2 Adding {Optional} Text

Definition: 'Optional text' is 'take or leave it' text that resides in a source document. When this text is encountered during a document assembly session, Pathagoras will ask if the text should remain in the document.

Your turn:

1. Choose (or create) a sentence or paragraph that you want to be 'optional.'
2. At the beginning of the optional text block, type a "{" and at the end of the optional text block, type a "}" (No quotes, of course. These characters are called 'braces' or a 'curly brackets'.)

Example:

```
{Please call me at your earliest convenience so that we can discuss the various options that I have outlined in this letter. }
```

Testing your work:

We repeat the warning give on the previous page: be mindful as you are testing your work to save the original work before running a test. Further, be sure not to save changes made after you have tested.

Alternatively, and this is strongly recommended, copy the section of text you want to test to a new document. Test using that copied text.

To activate the processing of the Optional text block(s) you just created, place your cursor immediately to the right of the closing 'curly' bracket (any one will do) and press <Alt-G>. (**Alt-D** triggers the Instant Database. **Alt-G** triggers all other processing functions, including the processing of {Optional} text.)

Make your choices and review the results. **DO NOT SAVE** this now changed document. To fix what may need fixing, close without saving the document. Reopen the last saved version and make corrections.

In actual production use, Pathagoras will always present a copy of the source text, never the original. Overwriting an original is not a concern. But as you are testing your setup, you likely will be working from the original. Hence this additional warning.

2.3 Adding {Options} Text

Definition: 'Options text' is multiple-choice text within a source document that is processed during the initial stages of a document assembly session. When encountered, Pathagoras will present the options in a selectable list, and ask which among the available options you want to select. (The selected options remain in the document. The unselected options are deleted.)

Your turn:

1. Choose (or create) a group of alternative sentences or paragraphs that you want presented

as text options.

2. At the beginning of the group, type a curly brace "{" (no quotes).
3. At the end of the options text block, type a closing curly brace "}" (again, no quotes).
4. In between each option, type a simple forward slash plus the word OR. Like this: "/OR". ("OR" must be in CAPS.) You can have up to 6 options.

Sample (with 3 options).

```
{Please call me at your earliest convenience so that we can discuss the various options that I have outlined in this letter./ORPlease send any questions you may have to me by e-mail at the following address: info@pathagoras.com./ORPlease send us a fax with your order and questions. }
```

The red coloring in the example above is for emphasis only. It is not required for an Options text block.



If you wish to test the action of the above sample, copy and paste it into any Word document. (Remove any 'Enters' from the pasted text to get the best 'effect'.) Then, click the Pathagoras dropdown features menu, click the Process element and click "Process Page." Pathagoras will process the text and you can see how these options blocks work. (You may recall from the previous lesson that you can press <Alt-G> to process {optional text blocks}. <Alt-G> is available here as well. We just wanted to introduce you to another alternative.)

2.4 Last Step

As defined above, a '*source document*' is any text that Pathagoras uses to create the initial draft of a new document during a document assembly session. A source document can be a complete 'stand-alone' document with all text, variables and options/optional text blocks needed to create a complete document, all contained within a single document. (This is the type you just created, often called a 'template'.)

Source documents can also be 'building blocks', individual documents, each one of which contains a single topical section of a formerly whole document. Selected building blocks can be assemble into a highly personalized, complete document. Pathagoras provides all of the tools to make this happen.

Your turn: Save the source document you just created into an appropriate 'office forms' folder. If the name of the document still carries the name of the original client, do a 'SaveAs' and give the Pathagorized document an appropriate 'form' name. Create more forms, as many as you desire. (Don't worry if you don't have everything perfect at this stage. You can easily add more content later.) We will use these document, and others you may Pathagorize and save here, in a later lesson.

Personalize Your First Document

Definition: 'Personalizing' a document is simply replacing the variables in the newly assembled text with appropriate names, addresses, quantities, colors, etc.

While we ordinarily don't want you working on the original of any document (see the framed text in the next section titled '[Assemble Your First Document](#)'¹⁷), we want to show you early on the automation features of the program. While we hope you will not make a habit of this, we will start with an 'original' document.

Your turn:

1. Open the document you created in the previous exercise. Perform a **SaveAs** in order to create a new document and avoid the possibility of overwriting your original. (In normal operations, Pathagoras never calls up the original document, only a copy. But we are in a special circumstance here at the early stage of the learning curve and will start with the original for a brief moment.)
2. Press the <Alt-D> key combination. The Instant Database Screen will appear. See Figure 1.

If for some reason the <Alt-D> function doesn't work, do not panic. Click the Pathagoras features menu and select the Instant Database entry in the list.

3. Note the two columns of the Instant Database form. The left side will contain the variables in your document. The right side will contain the personal data that you want to substitute for the variables.

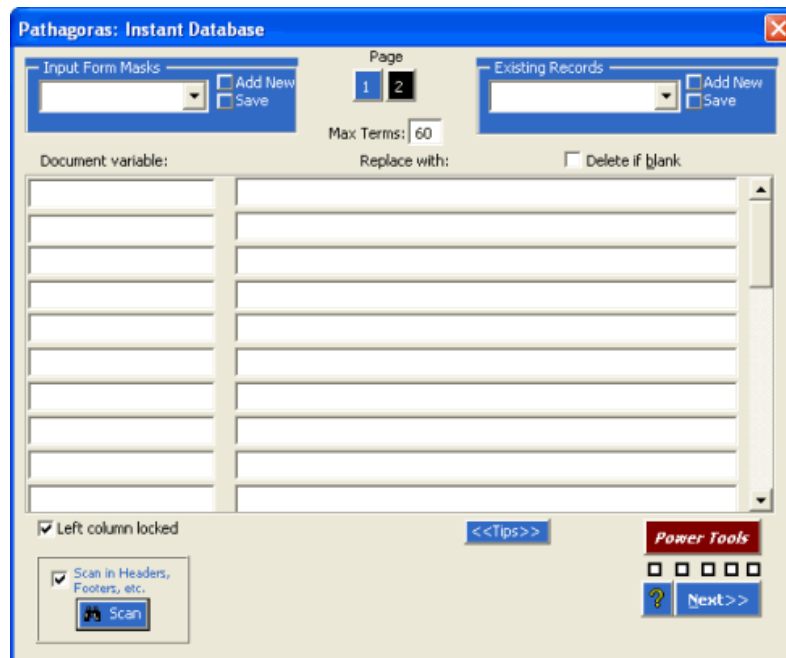


Figure 1. The Instant Database Screen

- With initial installations, the AutoScan feature is 'on.' The bracketed variables in your document will automatically be displayed in the Instant Database screen. But many users prefer to disable the AutoScan feature. (This is especially so when data records have been saved and regularly recalled.) If you have turned off AutoScan, click the <Scan> button at the left (toward the bottom) of the Instant Database screen to get Pathagoras to populate the screen with variables.
 - Your job now is to put 'real people' values in the right side. Just type in a real (or not) value next to each variable name. Press the tab button to move from field to field.
4. When you have finished placing 'client/customer specific' values in each box next to a variable name, Press the **Next>>** button in the lower right corner of the screen.
 5. At this step, Pathagoras will present the following question: "Do you want to save the contents of this Instant Database screen as a new data record?" Say "Yes" and, when prompted, give the 'record' a name--(maybe the last name of the real or fake person you are completing this form for). The pairings of [variables] and personal data will be saved by the system for reuse with another document.

This is the 'Database' part of the system. It is optional. It is perfectly ok to answer the question 'No.' Indeed, you should answer 'no' when you know that you will not need the information again.

6. Immediately after you save the data record (or elect not to), all of the variables in the document that match the variables in the Instant Database screen will instantly be replaced with the personal values you provided.
7. Close the document, *making sure not to overwrite the original*. Either do a 'SaveAs' or simply say 'no' when you are asked if you want to 'save changes.' (Once you learn about, and use, DropDown Lists or the Libraries & Books screen to insert text, you never will have to worry about overwriting an original document.)
8. Now, let's try out the 'Database' aspect of Pathagoras.
 - a. Recall another document to the screen. (Actually, you may wish to recall the same document to the screen, since it may be the only one you have 'Pathagorized' to this point. Just pretend it is a different document for the remainder of this exercise.
 - b. Press <Alt-D> just like you did in step 2 immediately above. However, instead of <Scanning> for variables when the Instant Database screen appears, click the drop down box at the right of the screen labeled "Existing Records." (See screen shot above.) A list will appear. This list contains the personal data records you have created to date, as well as the client/customer you added in step 5 above.
 - c. Click on the name of the record you saved in step 5 above. Press **Next>>** and the replacements are made. See how the database part works? (Close, but do not save, the completed work.)

You have 'Pathagorized' a document, called up a copy of the source text, and personalized it with the Instant Database. But you don't yet have a document assembly 'system'. Let's create a simple one. Keep reading.

Your First System

Creating a document assembly *system* (with many documents from which to choose) is easy. Only a minimum of setup, and no programming, is required. Actually, it is all accomplished by 'pointing' (to folders).

If you do not have forms segregated into organized folders (e.g., Will files in a Will folder, Contract forms in a Contracts folder, etc.), you should begin doing that soon. That kind of organization will dramatically improve the overall operation of any document assembly system. (This is done outside of Pathagoras. It is just Word/Windows file and folder 'stuff'.)

But for right now, just create one folder which contains some forms that you intend to use for document assembly purposes. Whether you are using an existing folder or have created a new one, we want you to pour 'lots' of forms and documents into it. (Don't worry about getting all possible documents and forms into the folder for the time being. And don't worry about segregating them by subject. You can always break things up later, or add more forms, at your leisure. For purposes of the following demonstration, simply having a lot of documents in a single folder is the most important goal.) And make sure that the document you Pathagorized in the previous section of this pamphlet is there.

Pathagoras works best with lots of documents in a single folder. It is actually better (and easier) to have dozens of document in one or 2 folders than to have one or two document in dozens of folders and subfolders. So please don't hesitate to heavily populate the folder that we will be using for the following exercises.

4.1 Creating Your First Library

Pathagoras has adopted a Libraries>>Books>>Clauses metaphor to describe the manner in which it organizes documents and forms.

Let's define a 'book' first. A 'book' is a *pointer* to a folder that contains the 'source text.' Nothing fancy -- just a pointer. ('Source text' is any text that you want to use for assembling documents.) When assigned, a book points to a standard Word/Windows folder (local or network) anywhere on your system where form documents or clauses are stored.

A 'library' is simply a collection of up to 10 'books.' (Lawyers: think of a library as a "Practice System," and the books being the individual topics within the larger system.)

The Demo documents and settings that ship with Pathagoras are good tools to help you to learn the program's basic features. However, right now we need you to create a new library to hold your works. Here are the steps to create a new library:

1. Click the Document Assembly icon.

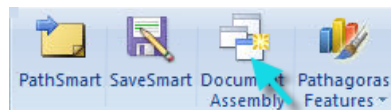


Figure 1. The Pathagoras Toolbar.
The image at the right, the Word2007 and later toolbar.
The arrow points to Document Assembly icon.

The Libraries & Books screen appears. The default 'DocAssemDemo' library is on display.

- Drop down the list of available Libraries. Click the <<Add New Library>> entry.

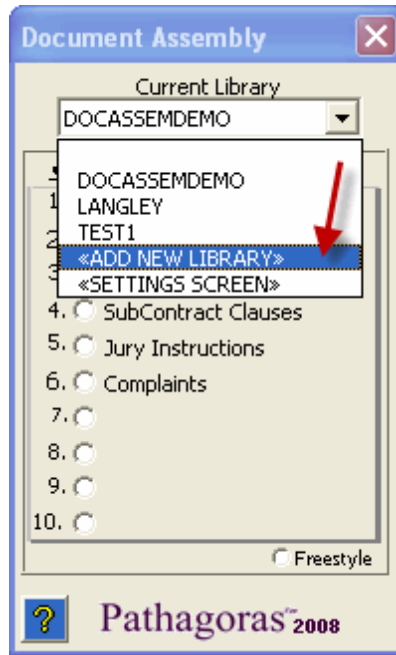


Figure 2. Initial Document Assembly Screen

The following screen will appear:

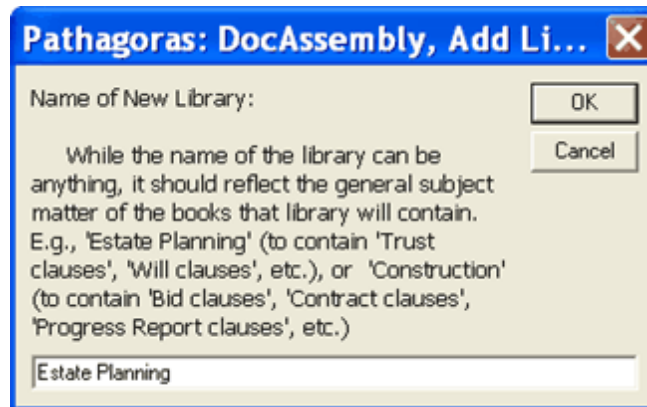


Figure 3. Document Assembly Settings screen

- Provide a name for your new library. The name should reflect a broad, not a specific, topic. In a law office, for example, "Estate Planning" and "Family Law" would be good 'general topic' names for libraries. (Remember, each library will contain several books, and therefore the library's name should be generic enough to encompass all of the books.) Click OK.

After you click OK, the Document Assembly 'Settings' screen will appear, showing the previous Default Library's settings (Figure 4). Pathagoras will then lay over that a screen (Figure 5) asking how much, if any, of the previous Library's settings you wish to keep.

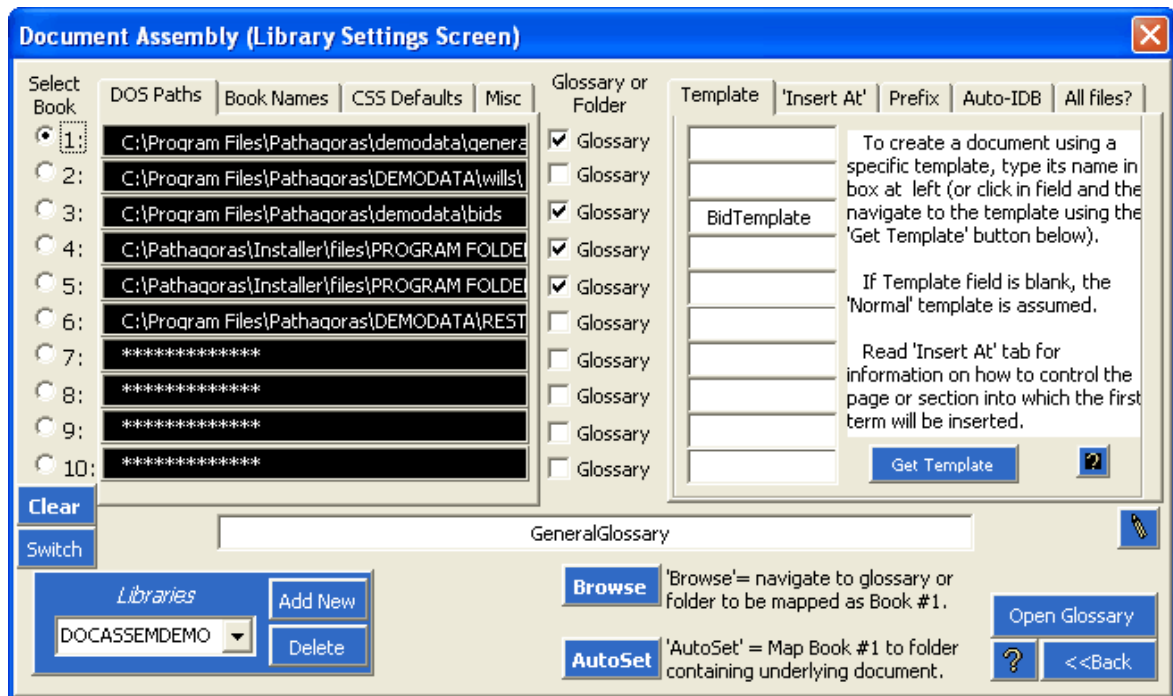


Figure 4. Document Assembly Settings screen

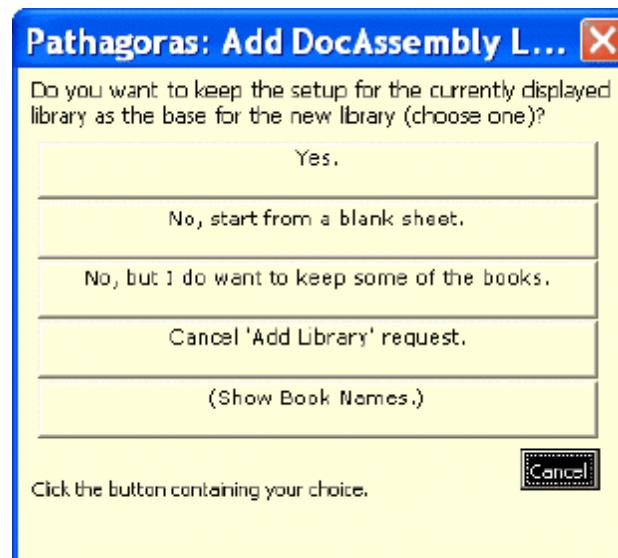


Figure 5. Let Pathagoras know which elements of the 'old' Library's Settings (if any) you want to carry over to your new Library

- When Figure 5 displays, make a choice. We recommend that you start from a blank slate, so, for this exercise, click the second button.

5. The screens shown in Figures 4 & 5 will disappear. You have created an empty library. Now it is time to "Shelve Your First Book."

4.2 Shelving Your First Book

A book is simply a pointer to the folder which holds clauses for your document assembly system. But don't make a big deal about this. This folder is nothing more than a standard Word folder. It is a folder which already contains (or will contain) standard Word documents that you either already have or will create and 'Pathagorize.'

In order to be able to quickly select documents from your 'books', you must place them onto one of the 'shelves' of the library we just created. In Pathagoras, 'shelving' just means 'pointing.'

Keep this fact in mind as you go through this exercise: a book is simply a pointer to where Pathagoras will look for forms and documents. It is totally user assigned. They are 'your' folders, not 'Pathagoras' folders. Once you fully grasp this very basic concept, then the rest will flow quite readily. (To see where an existing book points, just hover your cursor over a 'filled' bookshelf in the 'Libraries & Books' screen and study the 'pop-up'.)

To place a book on a shelf in your new library:

1. Click the Document Assembly icon.

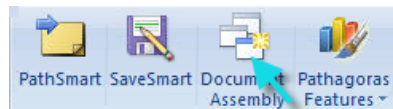


Figure 1. The Pathagoras Toolbar.
The arrow points to Document Assembly icon.

2. Click on any blank line. A new item "Quick Set" appears toward the right side of the screen. (See below.) Click it.

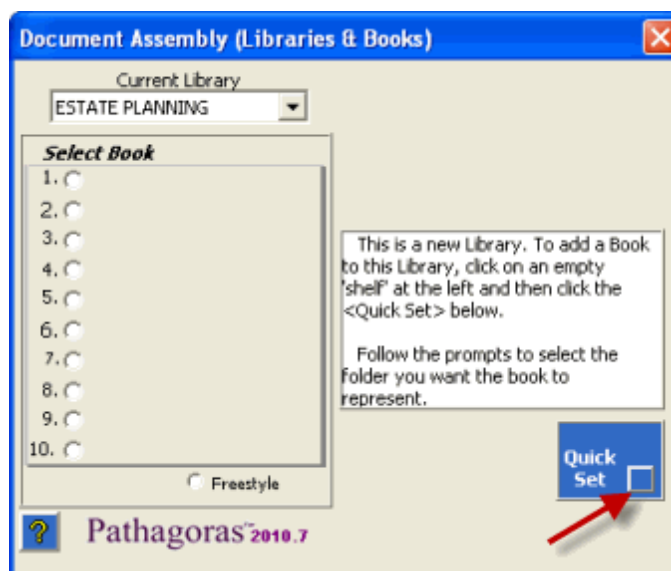


Figure 2.
When an empty shelf in the library is selected, the Quick Set button displays.

3. A new screen appears. (Figure 2.) It offers you choices as to what type of documents you want this book to contain. Pathagoras allows several options, but for now, click the first entry. (It's called "all DOCUMENTS (*.doc files) in a selected folder").

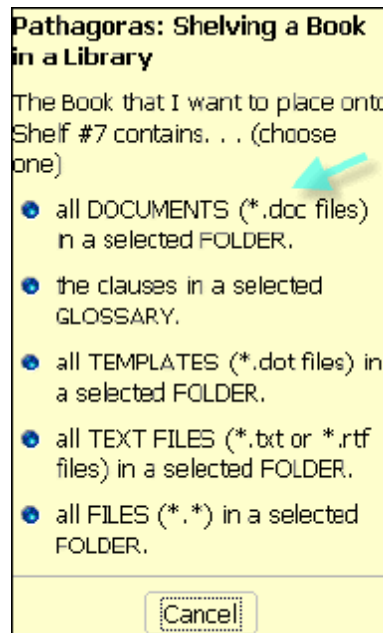
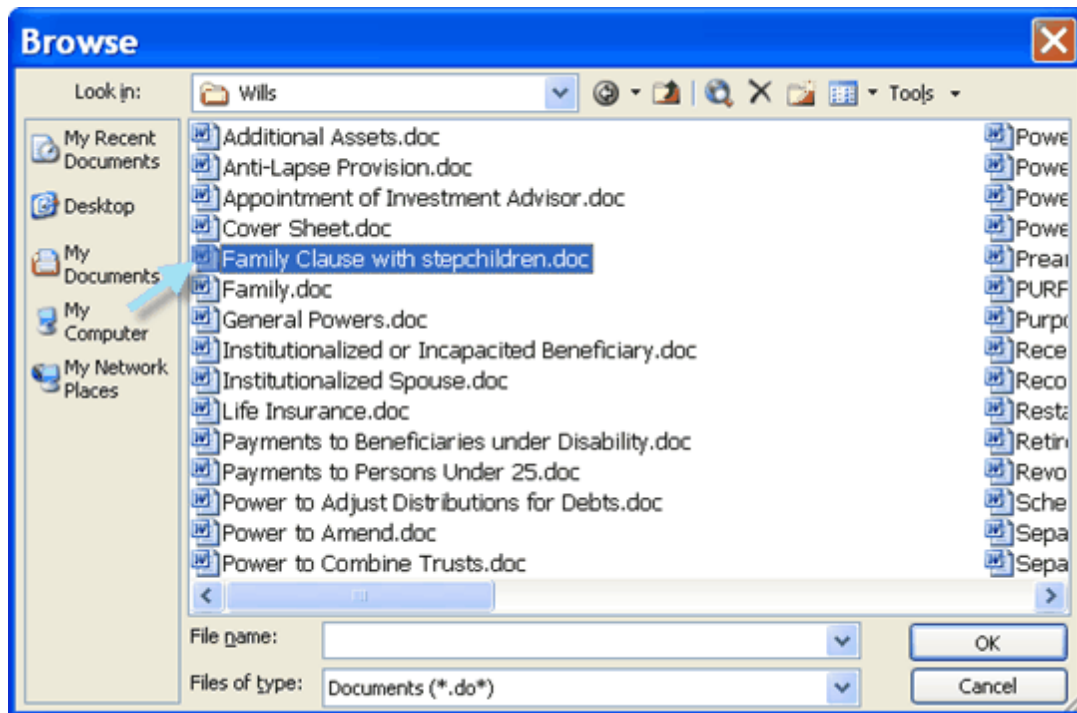


Figure 3.

4. Follow the instructions that follow and navigate to the folder that contains the documents or forms you wish to place onto the selected shelf.
5. a. Word2000 users: Press 'Save.' (Do not select a document.)
- b. Word 2002-2010 users: Select one document from the folder and then click 'OK.'

→NOTE: It absolutely does not matter which document you select. The selection is only to confirm that you have finished navigating, that you are inside of the desired folder, and so that the OK button can become 'hot.'

Don't worry about having to remember whether to press 'Save' or 'OK' (i.e., whether you are in Word 2000 or Word 2003, etc.). The on-screen instructions will remind you what to do.



Navigate to the folder that contains the documents.

Select any document in the folder. Then press OK.

(Word2000 users will navigate to inside the desired folder and just press 'Save.'

8. You will next be asked to provide a name for the book. The name of the folder will be proposed, but any name you choose is fine. It should reflect the nature of the book. Here, we can say "Wills."
9. Press the remaining "OK" buttons. Accept any remaining defaults. If you are presented a screen that you do not now know how to complete, just leave it blank. It's fine! The 'right' answers are just not critical at this stage. You will learn more about those features later.
10. The book is now 'shelved' in your new library. Pathagoras will display a "Success" screen reflecting that fact.
11. You can place other books onto the library shelves by repeating the above steps.

You have now placed your first book onto a shelf in your library. This makes all documents in that folder (book), and all folders (books) that you have shelved, available for document assembly. In the next step, we are going to take advantage of the 'shelved' books.

Remember: A book is merely a pointer to a Word/Windows folder. Nothing more.

You can repeat these steps to assign any folder to any empty shelf. If you want to assign a folder to a currently 'occupied' shelf, click the Settings button. You will be taken to a different screen where more activities can be handled, but the concept of "book" equals "pointer to folder" is the same.

4.3 'Assemble' Your First Document

→ An Overriding 'Pathagorean' Principle

You should never 'assemble' any documents using an original document(s) as the 'base.' You should only work with copies of the original text. So long as you abide by this rule, you will not accidentally overwrite the original by forgetting to do a 'SaveAs'.

When used as suggested, Pathagoras automatically implements this rule for you. When you select a document using Pathagoras tools, you will always be working on a copy.

How do you know it is a copy? Look for the 'name' of the document in the upper left hand corner of the screen. It will be named "Document1", "Document5", etc.

Of course, there is one exception to the above rule. When you are *intentionally* editing the original with the goal of improving the source text itself (refining the text, adding variables, correcting spelling errors, etc.), you must open and work on the original document. But NEVER NEVER NEVER use the original of a document with the idea of editing it to become a final document for a specific client or customer.

If you find yourself working on the original for other than source editing purposes, you should rethink your process, and implement the tools provided by the program. If you do nothing else in your early days with the program you should at least "[Create your First Library](#)^[11]" and "[Shelve your First Book](#)^[14]"

To 'assemble' your first document from the book you just created:

1. Click the document assembly icon. The 'Document Assembly (Libraries & Books)' screen will again appear, but this time it will display the book(s) you shelved in earlier parts of this lesson.
2. Select the option button next to the name of the book you assigned in the above exercise. (If you did not create a new book or library, and saved the document into your Word default document folder, click the Default Document folder, typically folder #7 in the DocAssemDemo Library.)
3. Click the **Next>>** button. The Clause Selection Screen displays. All of the documents in the selected book will show in the left panel. You should even see the document you created in steps taken in earlier sections of this Manual.
4. Click on the form document you created in the previous steps.
Diversion: press the <Preview> button. The first 1000 characters of the text of the form will appear in a preview screen. So, if you are not quite sure what a particular clause says or does, preview it. Close the Preview screen.
5. Click the <<Add>> button to move your selection from the left column to the right. (You can also double click on the selection to accomplish the transfer.)
6. If it is not already selected, select the "Assemble" radio button at the top right side of the screen. Then click the **Next>>** button.
7. A copy of the form you selected for assembly will quickly be inserted onto a new page.

(You can tell it is a copy, and not the original document, because it is called "Document 2" or "Document 5" or something like that. The original document is safely tucked away in your folder. This prevents accidentally overwriting the original forms -- not that you have ever done that, but some other people have).

These steps place a copy of the form onto your editing screen.

You have now 'assembled' a document. As a practical matter, however, you have only placed a copy of only one document onto your editing screen. Nevertheless, you are well on your way to understanding what document assembly is all about. We hope that you are able to see (from just the little bit of work you have done thus far) the beginnings of a highly flexible, highly functional document assembly system.

4.4 The Final Touches

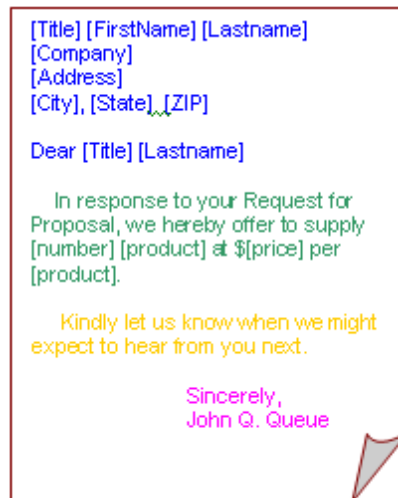
THE FINAL STEP: You are almost there.

- You have composed a single automated document. This is in the nature of what many programs call a form or a 'template.'
- Templates are nice, but document assembly suggests building complete documents from component parts. (Think here building blocks and 'paragraph assembly.')
- And you are not yet working with those component parts of a document. Let's take that last step.

Your turn:

- Locate the form document you created in earlier steps.
- Break it up into 3 or 4 of its main component pieces. Here is one way to do it.
 - Highlight a small portion of the document.
 - Copy the text and paste it into a new, separate document. Give the new document a name that correctly identifies its purpose.
 - Save the new document (now a portion of the larger document) in the same folder as the original).
 - Repeat for the remaining sections.

By way of illustration, the sample document below conveniently breaks up into 4 pieces. (The colors are for instruction purposes only. They are not relevant except to identify the component sections.)



[Title] [FirstName] [Lastname]
[Company]
[Address]
[City], [State], [ZIP]

Dear [Title] [Lastname]

In response to your Request for Proposal, we hereby offer to supply [number] [product] at \$[price] per [product].

Kindly let us know when we might expect to hear from you next.

Sincerely,
John Q. Queue

The 'blue' section might be saved out as "Address & Salutation"; the green section could be called "Order info"; the yellow could be called "Closing text." The pink: "Signature lines". If there are multiple authors in the office, you could duplicate the signature line, perhaps calling one "sigJQQ" and another one "sigRHL" and a third "sigDBL" etc.

When you have completed the 'disassembly' exercise, repeat the document assembly and personalization steps above. Are you seeing the big picture here? Now this is true document assembly.

At your convenience, add more clauses to the folder until you have yourself a variety of clauses from which you can build a variety of different documents. Keep going by breaking up other documents on other subjects, placing them into separate folders, and assigning those folders to separate books. The system grows. Slowly, but surely.

→ **An important note of reassurance:** While we asked you above to *manually* disassemble your document (and we hope that it was easy for you to do so), rest assured that Pathagoras provides tools that will automatically break up larger documents for you. (See section 4.5 below for a more automated way to accomplish this.) It will also automatically name the component pieces for you.

The last step: Display the Libraries & Books screen again. Select the book you earlier created and which now contains the disassembled clauses. Click Next. After the Clause Selection Screen appears, choose one, several or all clauses. You now have build a simple document from your simple, but potentially very powerful document assembly system.

4.5 Adding Documents to a Book

In the previous exercise, we asked you to point to a folder that had 'lots' of document already in it. But as you are building and perfecting your system, you will be adding more and more documents/clauses/phrases/building blocks, etc. to your books.

Pathagoras offers many ways to add documents to a book, but we are going to concentrate on just 2. Here are the steps.


Manual add: this means exactly what it says. Manually move existing documents, or manually

save new documents into the folder represented by the book. Never forget that Pathagoras is (1) very dynamic and (2) totally based in Word. Anything you add to a Word folder (or modify in that folder) will immediately be reflected in the Pathagoras book based on that folder.

Add new documents via the Libraries and Books screen:

Here are the steps:

(1) Display the item you want to add to the book.

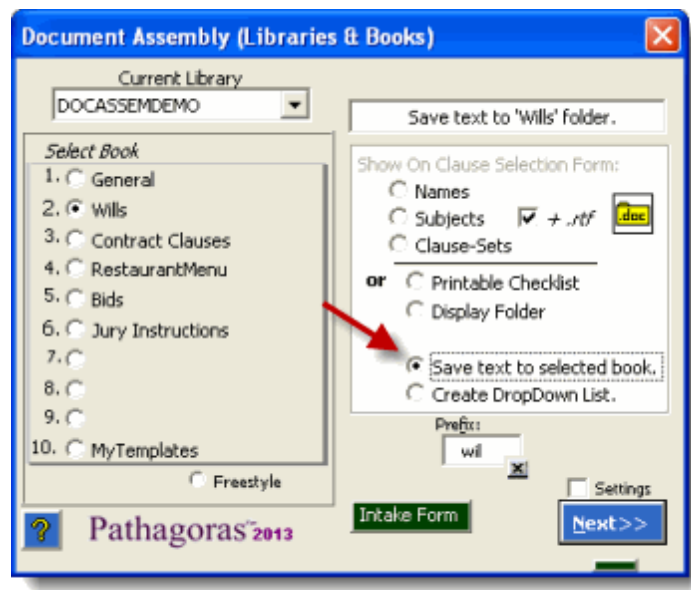
 The item you choose to add to the book can be anything. It can be text, it can be a picture, a chart, etc. You can copy text/data/pictures/tables/links/whatever from the Internet and paste it onto the Word editing screen. You may have text from a forms book that you want to add to your collection of forms. It simply does not matter to Pathagoras what the source of the text is. So long as you can display it onto your Word screen, it can be added to a book.

(2) If you want to add just a portion of the displayed text, highlight that portion. If you want to add the entire document, you don't have to highlight anything.

(3) Press the Document Assembly icon. (It is the third one from the left, next to the Pathagoras features list.) The *Libraries & Books* screen will display.

(4) Select the target book from the list of books at the left of the screen. If the book is not in your current library, select a new library from the drop down list at the right.

(5) After you select the target book, the box in the middle will display a series of options. Choose "Save text to selected book." See the illustration below.



'Save text to selected book' selected.

(6) Click the Next>> button. Pathagoras will display a standard "Save Document" screen. But, unlike what will happen outside of this screen, the folder associated with the book you have selected will be pre-chosen for you. You do not have to navigate to it. Simply name your document and then click the Save button on that screen.

(7) Your newly saved document will display on the Clause Selection Screen the next time you perform a document assembly routine.

Add new documents via a DropDown List:

We recognize that DropDown Lists have not yet been introduced, but we cannot leave you thinking that the above is the only, or the primary way to add text to your system. Once you have added your first DropDown List, you can add text in two clicks. Once you have highlighted the block of text you want to save as a separate document:

- (1) Drop down the DropDown List that points to the folder into which you want to add text.
- (2) Click the item toward the bottom of the List that reads "Add Text to Folder."
- (3) Pathagoras will display a screen from the "TermWorks!" module of the program which allows you to name the document and (optionally) to provide a subject for the document. When done, click the green "Add Document" button. That is all you need to do.

Here are the steps:

4.6 Congratulations!

You are done! You have neutered a document and saved it in a forms folder. You shelved that folder as a book in your current library. You have assembled a document and provided personal information in place of the variables in the source document. You have taken a 'complete document' and disassembled it into its component parts so that you can pick and choose among an assortment of building blocks.

You are a document assembly wizard!

Keep on neutering documents. Create more books. It probably makes better organizational sense to store your 'contract' forms in a different folder from your 'proposal' forms. Keep them in separate folders and assign them to different books. With Pathagoras, you will always have instant access to them all.

As you become comfortable with the above steps and features, you will want to do more. And Pathagoras will be right with you. Whenever you ask "I wonder if Pathagoras will let me do this?" the answer will almost always be "Yes." If you cannot find how to do it in a few minutes of looking, call or write to us and we will be more than happy to point you in the right direction. And if the feature you desire doesn't exist, maybe we can change that. Many features that you now see are from suggestions made by users such as yourself.

Pathagoras is laden with very useful features that go far beyond what you have seen here. When you are ready, explore the options available on the various overlay screens that you will see. Explore the choices in the Pathagoras features menu. Visit the Pathagoras website (www.pathagoras.com) and read more about the breadth and depth of what we think is a truly remarkable program. And peruse the main [Pathagoras Manual](#). Just skim the body of the rather sizeable manual, but perhaps spend a few minutes reading the index for document assembly and management ideas that you haven't even thought possible.

If you have a question for which you cannot quickly find an answer, call or write to us at the [contact points listed here](#)^[32]. We truly enjoy hearing from our customers.

Create a DropDown List

Definition: A drop down list is any of those lists that currently sit at the top of your Word editing screen that give you quick access to Word settings.

- For example, Word presents the various 'Styles' and 'Fonts' which provide visual texture to your documents in drop down lists. All you have to do is point and click to an item within the list and Word does the rest.

Pathagoras' allows you to create special DropDown Lists of the contents of any book. These Lists function in a fashion identical to Word's drop down lists: You point, you click, and the selected element is applied to your document. In this case the selected document is automatically inserted into the current document.

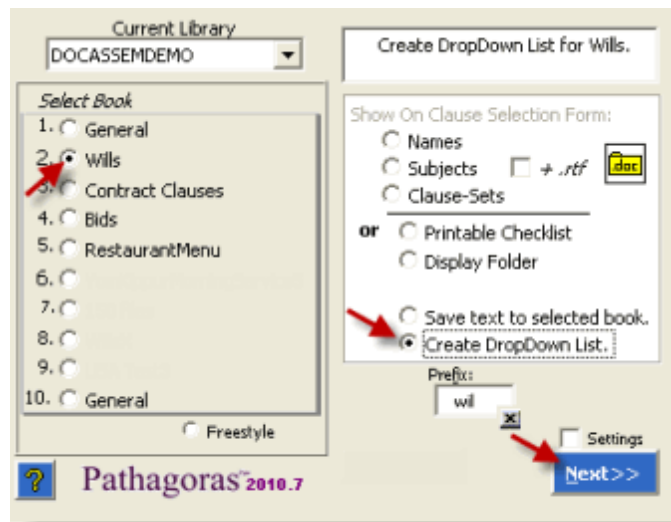
- The folder you select to populate a DropDown List can be *any* folder on your system.
- The folder can contain *anything* -- Word documents, Word Perfect® documents, images, PDF files. Anything.

Creating a DropDown List takes 30 seconds tops. Once created the List remains always active, always visible and always ready. When you exit Word and then return, so do the DropDown Lists.

You can maintain up to 10 DropDown Lists simultaneously (5 in the Demo version).

Your Turn:

- 1) Display the Libraries & Books screen and select the book from which you wish to create a DropDown List.
- 2) The action box opens in the middle of the Libraries & Books screen. Click "Create DropDown List" option.
- 3) Click **Next>>**.



Create DropDown List using a Book in a Library.

The contents of the selected book is quickly created. It displays on your screen in the menu

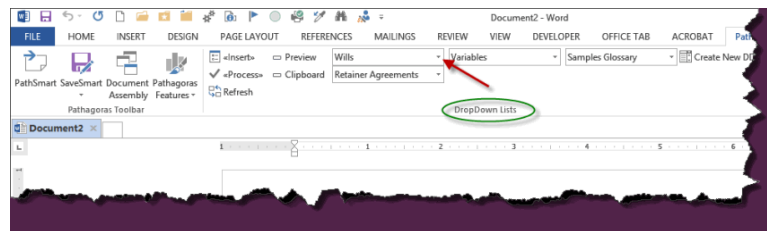
area. (Word 2007 users: it is behind the Pathagoras tab.) It is also ready to use with no further effort. Just point and click on the clause you desire.

Alternative way to create a DropDown List: 'FreeStyle'

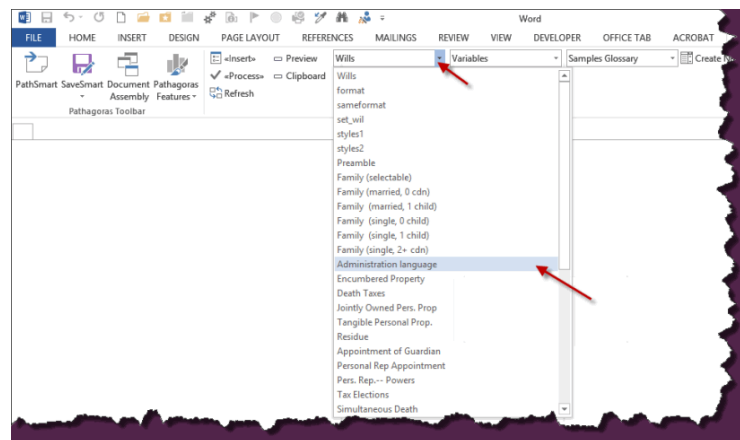
You are not limited to just the books in a library as a source for DropDown Lists. Any folder anywhere on your system is eligible. To create a DropDown List 'free-style', click the DropDown List icon in the Pathagoras menu area and follow the directions. (If at least one DropDown List already exists, the 'icon' will have been turned into an 'area'. Click the bar that reads "Create New DDL.")

Using a DropDown List to create/enhance documents:

To instantly move the contents of any file from a DropDown List into your document, just 'point and click'. Once the List is created, you never have to navigate to a clause in that List ever again!



The DropDown lists displays in the Menu area.



DropDown list 'dropped down'. Select a clause.

Depending upon the state of the <<Insert/New Doc>> indicator at the right end of the List, the selected item is placed in the document.

- If <<Insert>> is displayed, the selected document is inserted into the current document at the last cursor location.
- If the indicator reflects <<New Doc>>, a new document will be added, and the text is added to the new document.

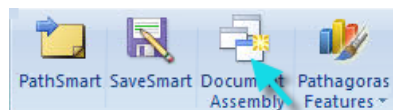


If you tend to use 'complete documents' as your source forms, you definitely should use DropDown Lists for creating new documents. The 'typical' document assembly session, using the Document Assembly Icon is at least 7 key clicks (still less that without Pathagoras, but not an insignificant number). With DropDown Lists, the number of clicks to get to the document of your choice is only TWO!

The 'DocAssemDemo' Docs

To learn a new program such as Pathagoras, some folks prefer to jump right in, skipping the introductory materials and using their own forms. The first three sections of this Manual are for you. They will get you more quickly into Pathagoras than any other resource, and will leave you with a sense of how easy it will be to implement Pathagoras in your office using your forms.

Others prefer a more 'bird's eye view' approach. They want to get a sense of the feel, speed and general nature of the program from a bit of a distance. They are happy to explore the program using the demo models that ship with the trial version. This part of the manual is for you. We will show you document assembly and automation basics using our documents, and then you are free to begin experimenting with yours.



(1) Click the document assembly button. It is the third button from the left, depicting two documents merging into one. A screen called 'Document Assembly (Libraries and Books)' appears immediately after. It displays the current library (the name shows at the right in the drop down list) and the (up to 10) books that have been shelved in that library. (In this particular case, only 6 books have been assigned.)

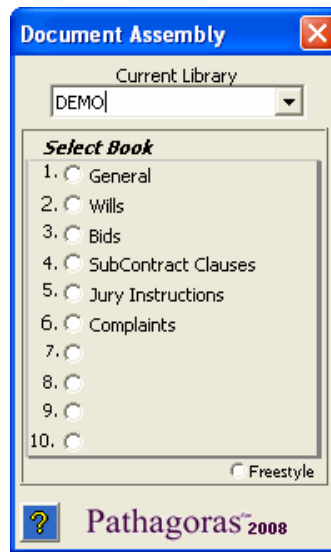


Figure 1. The initial Document Assembly (Libraries & Books) screen

-----A Bit of Explanation-----

Definitions and Landmarks:

Let's digress just a bit to get some vocabulary and other important concepts out of the way.

Pathagoras has adopted a 'library' and 'books' metaphor to describe the manner in which it organizes documents and forms.

- A 'library' is the top-most level of the document assembly structure. A library is a collection of books, each book representing a container of clauses or forms you will be using to assemble documents. You can have an unlimited number of libraries. New libraries can be added by clicking the Settings button on the above screen.
- A 'book' is a pointer. Each book points to a folder of documents, forms, and/or clauses that you intend to use to assemble documents. A book can be one of two types: a 'folder' or a 'glossary.'
 - A 'folder' is a standard, ordinary Windows folder containing Word documents. Your office forms on your computer are probably already organized in such a way that 'Will' documents and forms are in one folder, 'Contract' documents in another, 'General office' documents in another, etc. If so, you are already well on your way to a Pathagoras friendly system.
 - A 'glossary' operates just like a folder in the way that it helps you to organize clauses and forms by topic. However, instead of each term residing inside of a separate document in the same folder, all terms reside in the same document – the glossary. The individual terms in a glossary are separated from each other by 'bookmarks.' If you prefer glossaries over folders (there are a few benefits to using glossaries) Pathagoras can help you in the transition.
- Help, definitions and other types of guidance can be found on this and every screen that Pathagoras displays. Just click any you see.

-----Back to the Lesson-----

(2) Select one of the books (it doesn't matter which one).

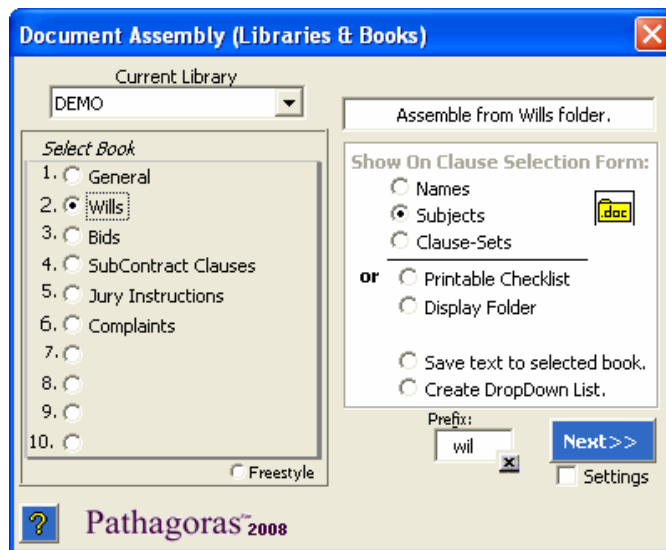


Figure 2 The Document Assembly screen, with book # 2 selected

-----A Bit of Explanation-----

Concepts and Landmarks:

You would typically click the Next>> button in lower right side of the screen at this point, but before doing so, we ask you to pause and look at the various options that are presented for your selection. The options appear in the center white box after you have selected a book:

“Show on Clause Selection Form:”

Names or Subjects: You can display the terms on the clause selection screen by the ‘Name’ or by the ‘Subject’ assigned to each term. The document Name is typically a short few words. The ‘Subject’ is much more descriptive. (If you study the ‘Will’ and ‘SubContract Clauses’ books, you will see that the clauses in those books use the more cryptic prefix/suffix pattern for names. More on this below and other writings.)

Clause-sets are collections of selected clauses represented by a single name. When selected, a clause-set will generate a complete document. Clause-sets are great for standard contracts, simple Wills, etc. Instead of choosing the same 10 clauses for a standard, simple document, create a clause-set and select just one item.

To the right of the ‘Name’ and ‘Subject’ radio buttons in the center panel, you will see a symbol like one of the following:



These symbols visually depict the nature of the clauses in the selected book. Click on each of the various books, and you will see the symbols change as you work your way down.

A folder with the letters ‘.doc’ signifies that the book contains standard Word documents.

A folder with the letters ‘.dot’ indicates that the terms are stored in the folder as Word

templates.

A folder with the letters '.txt' indicates that the terms are stored as unformatted ASCII text files. (Pathagoras can assemble those too!)

A Glossary is denoted by the grey square box with the 'G' in the lower left side. 'G'= glossary.

Administrative tools reside 'below the line.' These tools allow you to perform certain operations on a selected book

(1) You can create a checklist of all of the terms in the selected book. Use the list just for a handy reference, or print it out as a check-list and 'check off' the desired terms for the new document.)

(2) You can open the folder or the glossary if you need to quickly access either for editing or other management purposes.

If the book is a 'folder of documents,' you will be taken to the Windows folder that contains the terms. Everything in here should look familiar. These are 'plain ol' Word documents. Nothing more, nothing less.

- When you select a folder of terms for a document assembly session, Pathagoras simply reads the names of the documents and presents them onto a selection screen where you can choose one, two, ten, all, etc. of them for your new document.
- And if you were to add a new document into the folder, the next time you called up the Clause Selection Screen that new document would appear in the list.

If the book is a 'glossary,' you will be inside the actual document itself. A glossary is a rather simple document. It contains all of the clauses in a single document. You can identify the various clauses because they follow the following pattern. You should first see a red line of text. The red text reflects the term's 'name'. Immediately beneath that is a blue line of text that reflects its 'subject.' Beneath those identifiers is the actual text of the term. While you may not be able to see them, each term is enclosed within 'bookmarks' that Word (and Pathagoras) uses to identify the begin and end points of the actual term. To make the bookmarks visible, you can click Pathagoras|Main Menu and click the [Show Bookmarks] button. Despite its structure, a glossary is still an ordinary Word document.

(3) You can create a DropDown List of the terms in the selected book. These are very handy, very powerful, always-on, always-active lists that reside at the top of your editing screen which allow you select any term or form by simply pointing and clicking. You can read more about these very powerful DropDown Lists by clicking this link: [DropDown Lists](#).

-----Back to the Lesson-----

Okay. Tour over. Let's move on. Click the Next>> button.

What displays next is the Clause Selection Screen (Figure 2). This screen lists all of the terms in the selected book in the left hand column. You can select the specific terms you need in order to assemble the 'perfect' document for your customer or client.

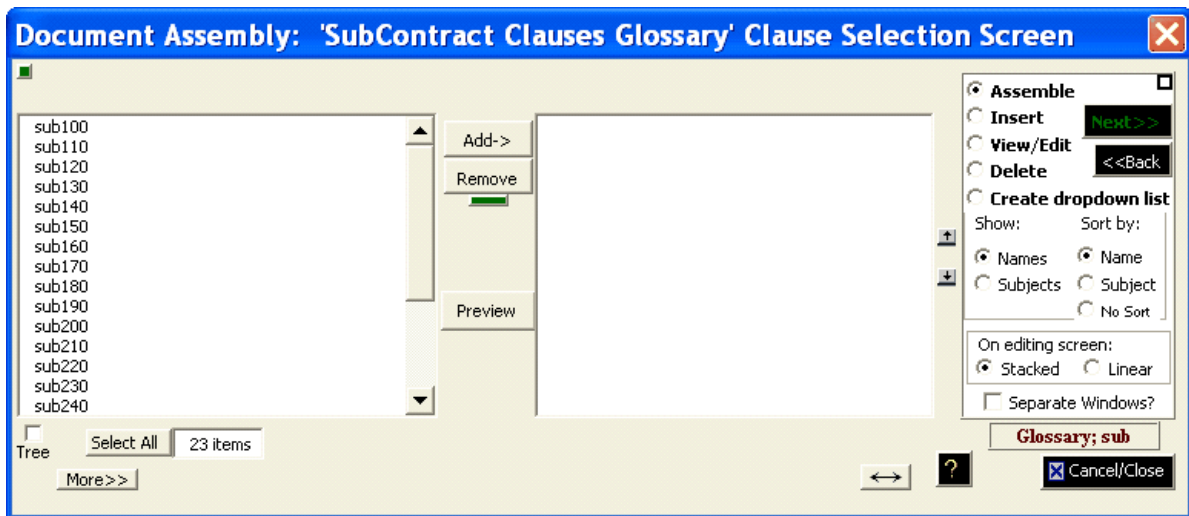


Figure 3. Clause Selection Screen, Names displayed

If this is not the view you wanted (i.e., you want to select terms by the more descriptive subject, not the prefix/suffix-style name), click the 'Subjects' button at the right:

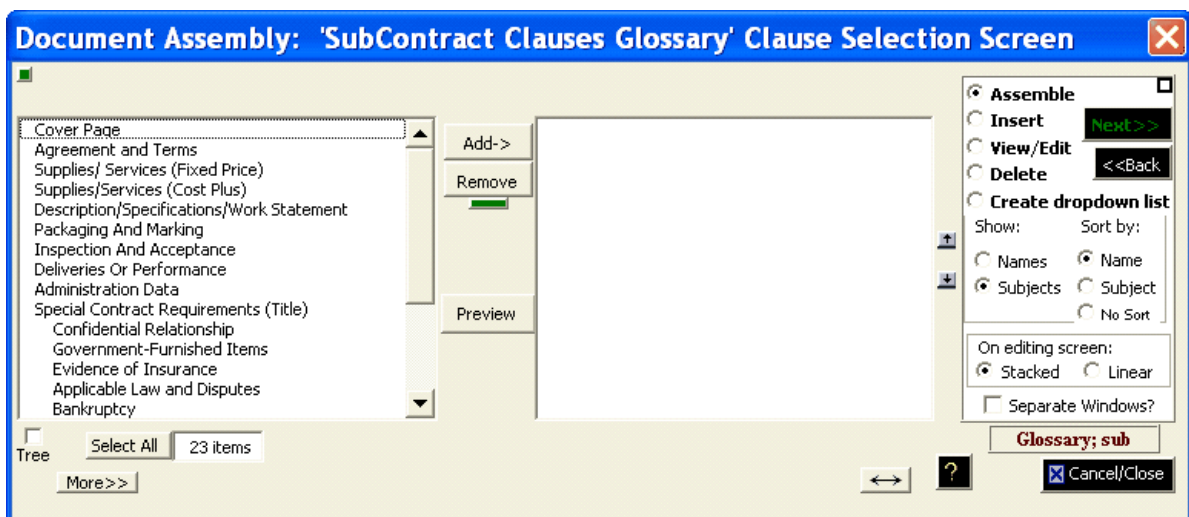


Figure 4. Clause Selection Screen, Subjects displayed

Ahh. Much better. With the screen repainted and showing the subjects, you can now choose from among clauses with meaningful descriptors.

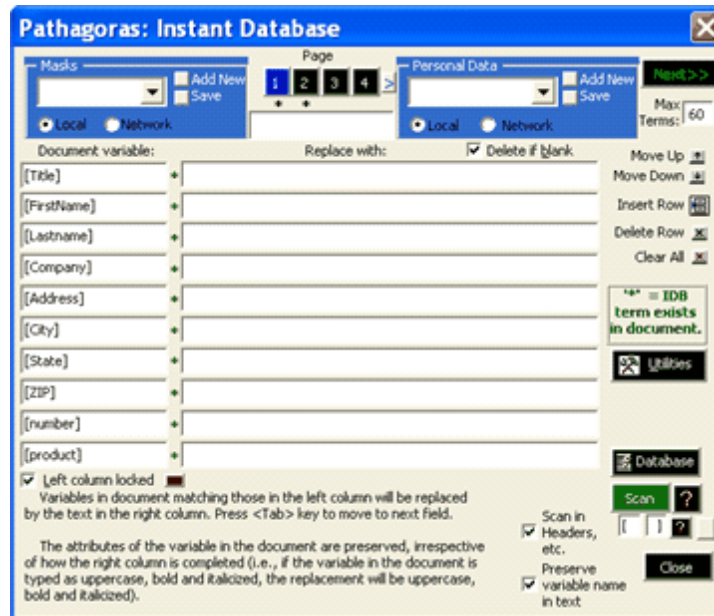
Note 1: You can cause the subjects to display 'in the first place' by clicking the Subjects option found on the initial Document Assembly screen, Figure 1.

Note 2: Despite their cryptic nature, the prefix/suffix style names of the various clauses can still be an important document assembly tool for you to consider. The names keep the clauses in the above list in a logical (alpha-numeric) order. And that style of name allows you to instantly recall a term simply by typing its name onto the editing screen and pressing a hot-button. Document Assembly with zero navigation! All of the benefits of the prefix/suffix naming style is beyond the scope of this booklet, but do not discount its usefulness.

Select one, some or all of the clauses from the left side of the Clause Selection Screen and move

them to the right. (Either double click on the item or by select the item and clicking the 'Add' button.) When you have selected the clauses you wish, click **Next>>**.

The document containing the clauses you moved to the right hand side is quickly assembled. Now it is time to replace the variables (if there are any).



1. With the document on-screen, press the key combination <Alt-D> (for 'database'). This calls up the InstantDatabase (Instant Database) screen. (Figure 4)
2. Scan for variables. Press the green Scan variable. The bracketed variables in your document will automatically appear in the left column of the Instant Database screen. In the right column, type meaningful 'personal data' for each variable as if you were creating an actual document for a client or customer.
3. Press **Next>>**. Pathagoras replaces the document variables with the personal data. (Say "No" to the question "Do you want to create a new Personal Data Record?" We'll save 'databasing' for another lesson.)

Now On Your Own

Select different books and assemble a variety of documents from the clauses provided in the DocAssemDemo library. Replace variables and select from the optional text choices provided. Then peruse the source documents that make up the books. (Click the Open Folder or Open Glossary choices 'below the line,') Note how all of the source clauses are all plain text in nature. Note the simple "words in brackets" construction of simple variables. Note that multiple-choice variables are simply variables with slashes "/" between the choices. None are complex. None have codes or hidden fields.

When you are ready to begin to work on your own system, read and perform the exercises in the sections at the front of this Beginner's Guide. With this Guide under your belt, you are well on your

way to becoming a document assembly expert.

There is still more to see and to do. Check out the remainder of the [Help Manual](#) for the details.

Sample 'Pathagorized' text and forms

The below text is a collection of the examples provided in previous sections of this Manual, plus additional sample text. If you are looking at this page electronically, you can block copy this entire page into a Word document. You can then get a flavor of how the program works, but without having to type a single character of text.

Note that all text is 'plain text'. You can augment any example just by typing more plain text. Any changes you make will be reflected in your next 'run-through.' (To view an electronic version of many more samples, go to www.pathagoras.com/sample.)

Sample Variables:

[Client Name], [product], [he/she/it/them]

Sample Optional text:

{Please call me as soon so that we can discuss the various options that I have outlined in this letter. }

Sample Options (multiple choice) text:

{Please call me as soon so that we can discuss the various options that I have outlined in this letter./ORPlease email me with any questions you may have at the following address: info@pathagoras.com./ORPlease send us a fax with your order and questions. }

[Title] [FirstName] [Lastname]
 [Company]
 [Address]
 [City], [State], [ZIP]
 Dear [Title] [Lastname]

In response to your Request for Proposal, we hereby offer to supply [number] [product] at \$[price] per [product].

Kindly let us know when we might expect to hear from you next.

Sincerely,
 John Q. Queue

AGREEMENT

This Agreement, by and between [PRIME CONTRACTOR], [Prime Contractor Address], [Prime Contractor City, ST ZIP], and [SUB CONTRACTOR], [Sub Contractor Address], [Sub Contractor City, ST ZIP]

AGREEMENT AND TERMS

Contractor agrees to furnish and deliver all items or perform all the service set forth or otherwise identified above and on any continuation sheets for the consideration stated herein. The rights and obligations of the parties to this contract shall be subject to and governed by the following documents: (a) this award|contract (b) the original solicitation, if any (c) such provisions, representations, certification and specifications as are attached or incorporated by reference herein

Total Amount of Contract: [Amount of Award].

'Pathagorized' documents

Support

8.1 Technical Support

Pathagoras prides itself on prompt, useful and personal customer service. While we hope that this Manual and the other instructional materials are helpful, you can still count on the 'personal touch' of Pathagoras' customer service as a 'first line' of help as well.

We truly enjoy hearing from our customers and potential customers. While we cannot promise that you will never receive a voice-messaging service if you call us, more likely you will receive a live person at the other end. But if you do get our voice mail, just leave a message or send us an email. We will get back with you promptly.

Contact information is spread across as many places as we could find so that you do not have to hunt for an email address or telephone number, and we repeat it here. Let us know if we can ever be of service.

Pathagoras
Innovative Software Products of VA, LLC
Roy Lasris, President
www.pathagoras.com
info@pathagoras.com
tel: 866-PATHAGORas (1-866-728-4246) (tollfree)
tel2:+1 (757) 877-2244 (USA)
117 Chisman Landing
Seaford, VA 23696 USA

Reporting a 'bug':

We ask you to report any and all program 'bugs' you encounter (whether you 'know' it is a bug, or just think it might be). If you encounter a problem while Pathagoras is in operation, and can duplicate it, please send us a list of the steps that you took to generate the error. (The error message of 'failure code' is rarely enough to pinpoint the source of the problem, so the more information you can provide to us, the better.) We would also greatly appreciate your sending any screen shots that may help us to better identify the issue. Sending us actual text of documents that didn't quite work would be good too. (We will not share your documents with anyone. We understand the proprietary nature of your personal or business work.)

Remote Assistance:

If you call us for guidance, or to report a bug that can be best explained visually, we likely can most effectively address the situation via 'virtual presence.' In other words, we can (and would like to) virtually sit at your machine. That way we can see the same thing that you are seeing at the same time that you are seeing it.

This can be readily accomplished via a wide variety of remote assistance tools. Our tool of preference is GoToMeeting®, a product of the Citrix Corporation. It is easy to use, offers quick

response time and allows us to sit together while we share information on your computer. If you feel a virtual meeting would be helpful, don't hesitate to say "Can we do a GoToMeeting?" (If you are otherwise covered under the Annual Support Agreement, there is no charge for the meeting. And don't worry about costs on our end. We have none beyond the annual subscription that we pay for GoToMeeting.)

To activate remote assistance after we have agreed to a session, display the Utilities/Settings screen and click the Miscellaneous tab. Click the red "Remote Assistance" button. Enter the Meeting ID number that we will provide in the text box and click the Remote Assistance button again to make the connection.

GoToMeeting® is a registered trademark of the Citrix Corporation

8.2 Non-technical Support

Pathagoras Author & Staff For Sale!

I am for sale! Yes, me personally, and my staff, too.

We are available to help you set up Pathagoras, establish your Pathagoras network if you have multiple licenses, create or refine your books and libraries, etc.

- **Let us Pathagorize You:** If you simply do not have the time to Pathagorize your forms and create a system, but know that this is the direction you must go, give us a call. We have skilled and talented 'Pathagorizers' on staff who can quickly respond to your every request. Send one or more of your current systems. We will set up a Pathagorized model system in return. What you will get back is a complete, immediately usable, book. We will also send you instructions on how to place it onto a new or existing library shelf. Since the returned material will be a collection of standard Word documents, you will be able to augment or freshen the text on your own as needed.

Our rates are reasonable. Call us for a quote. Your savings in future document assembly time will more than recapture the investment.

(If you want to take us up on this offer, we suggest that you send us just one of your systems, not all of them. When you get it back, study what we did and how we did it. Hopefully, then, you will feel so confident in how simple and easy it really is that you will attempt to 'Pathagorize' the next system yourself.)

- **Private Lessons:** If you choose not to read the manuals (I hate reading manuals too), you can simply 'buy' me to provide extended lessons and some 'on-site' (via GoToMeeting^(tm)) guidance on how to get set up and fully operational with Pathagoras. Put your whole office staff in front of a computer and a speaker phone and we will be all set. And when you consider how far I can get in that time, that can be quite a deal for you.
- **"Will you travel?"** Heck yes! I would love to! (Get me out of my law office, please!) Of course, the airplane ticket and accommodations would be on you. My on-site charges are a bit higher, but the work that I could accomplish in that day or two (setup and training) should make the investment very worthwhile.

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If you are looking for a document assembly program to help you to create standard documents/pleading/contracts, etc., there is not one out there with a shallower learning curve than Pathogoras. We make this claim because:

*An automated variable is nothing more than a word or phrase between square brackets. No formulas or fields are required. All text is standard keyboard text.

*Automated optional text is simply any text between curly brackets. It just cannot get any easier or faster than that.

*Pathogoras even self-generates its own data collection form for each document you create. (No other program can do that.) The data entered can be used for all future documents for that same client.

While we understand how precious time is, if you want to create time, you should be adopting a program that does that for you.

Pathogoras is such a program.

Pathagoras prides itself on providing prompt, useful and personal customer service. While we hope that this Manual and the other instructional materials are helpful, you can still count on the 'personal touch' of Pathagoras' customer service as a 'first line' of help as well.

We truly enjoy hearing from our customers and potential customers. While we cannot promise that you will never receive a voice-messaging service if you call us, more likely you will receive a live person at the other end. But if you do get our voice mail, just leave a message. We will call you back promptly.

Contact information is spread across as many places as we could find so that you do not have to hunt for an email address or telephone number, and we repeat it here. Let us know if we can ever be of service.

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