

Bundledocs Manual

Complete Training Manual

Want to learn how to use Bundledocs All Devices? You've come to the right place. Our manual contains everything you need to know about Bundledocs – from creating your first bundle to our advanced features. Let's get started...



bundledocs

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Getting Started with Bundledocs:

Welcome!

Need help creating bundles? No problem, Bundledocs is here to help. Our software is designed specifically to help legal professionals create court-ready bundles.

In short, Bundledocs automates time consuming activities to significantly reduce the time and effort involved in creating bundles. Bundledocs automatically indexes, paginates and compiles your documents to create a single PDF document that is fully bookmarked.

What's the best bit? Flexibility. When compared to traditional methods of bundle production, Bundledocs offers unrivalled flexibility to all. If last minute changes, amendments or additions are needed. No problem. With Bundledocs, there is no need to redo indexing and paginating, our software automatically regenerates a new bundle. At no extra cost.

Our manual has been designed to provide our users with everything they need to know to create a bundle using our Bundledocs App. It covers everything from creating your first simple bundle to more advanced features such as creating templates, working with templates and document dates etc.

Any Questions? We endeavour to help you with any queries or issues you may have. Please do not hesitate to contact the Bundledocs team via the following methods. **Online Chat:** Immediately chat with the Bundledocs team via our chat feature. Simply click on the grey tab in the bottom right corner of your account to chat live to a member of the team. **Email:** Please email general enquiries to info@bundledocs.com or any support issues to support@bundledocs.com. **Call:** +353 21 4826320.

We hope you enjoy using Bundledocs!












The Bundledocs Team



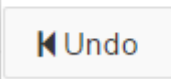



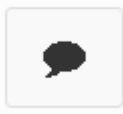









*Lets get started
creating the
perfect bundle*

Bundledocs Icons

Before we begin let's get familiar with some of the buttons used in your Bundledocs account.

	Home Return to home page
	Add New Bundle Select to create new bundles
	Get Started with Bundledocs Quickly review the 5 simple steps to create your bundle with Bundledocs.
	Edit Bundle Details Edit details of your bundle. This will reveal additional options
	Private Bundle A grey silhouette will appear by any bundle marked as private. Only the owner can view private bundles.
	Group Members Select to reveal owner of bundle. This icon appears when working with groups.
	Collaborators This icon indicates that this bundle is shared with collaborators. Select to reveal who has access to this bundle.
	Add Section Add additional sections within your bundle
	Upload Files Select to upload files into your sections
	Generate Select to generate and complete your bundle.
	Download Within this area you can preview/ download or OCR your bundle. Or even securely share it with others.

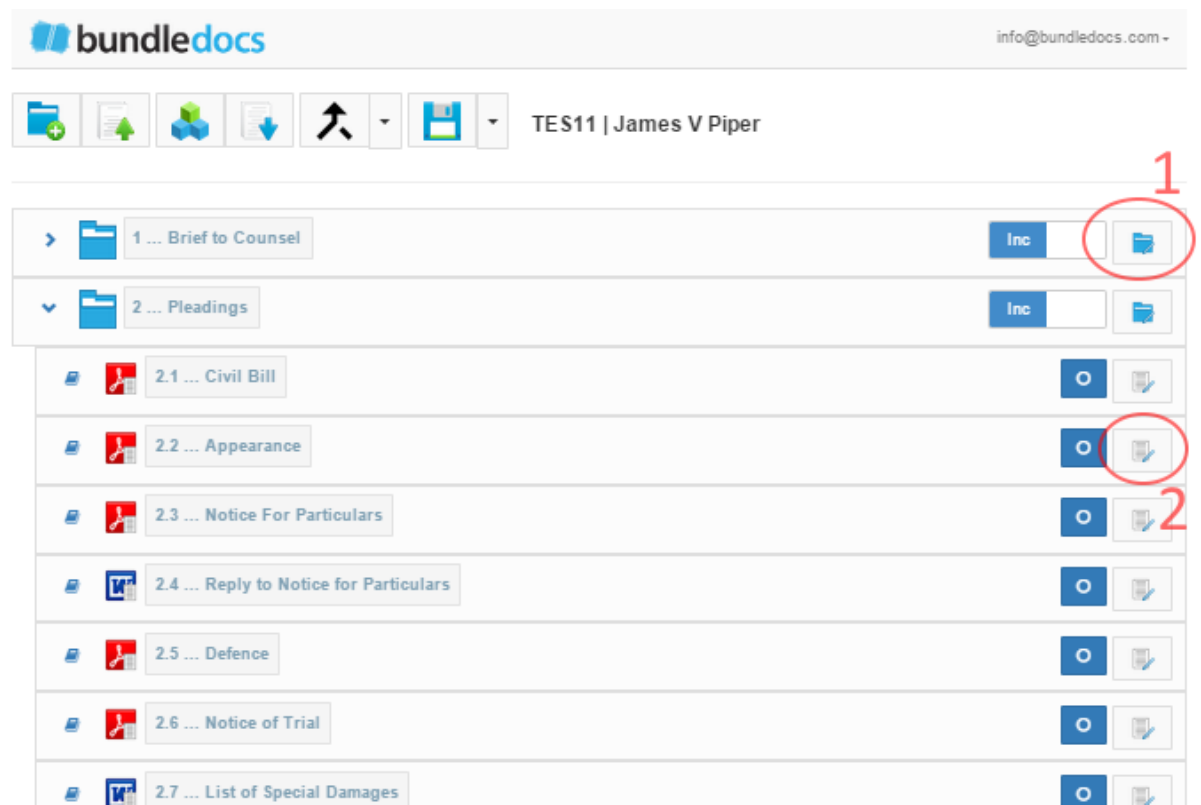
	<p>Merge Merge multiple files into a single document</p>
  	<p>Save Update/Save changes made to a bundle. Undo/Redo the most recent changes made.</p>
	<p>Expand/Collapse Select to expand or collapse any section. These icons will appear for any section or volume in Bundledocs.</p> <p>Note: A similar icon appears above all sections. This is a quick way to easily expand/collapse all sections at once. This is great when working with large complex bundles.</p>
	<p>Default Bundle Section Files are contained in the Default Bundle Section unless additional sections are created. Double click to quickly rename.</p> <p>Note: Once documents are uploaded, a number will automatically appear in the folder icon. This indicates the number of pages within each section and is helpful when working with volumes.</p>
	<p>Make Comments Type short comments to any section. This is great when working collaboratively with others.</p>
	<p>Include (Default Setting) /Exclude Slide to include/exclude a section within a bundle. This can also be done for individual documents.</p>
	<p>Edit Section Details Edit details of your bundle section. This will reveal additional options</p>
	<p>Edit Document Details Edit details of your document. This will reveal additional options</p>

	<p>Make Selections for Merge Click icons to select document(s). Any files selected will appear in red.</p>
	<p>Clear Selections for Merge Select 'Reset' to clear any selections made.</p>
	<p>File Type Icon A file type icon will appear to the right of any document uploaded into Bundledocs. Select the file type icon, for example PDF, to drag and drop documents.</p>
	<p>View Document Select to view any document uploaded into Bundledocs. Once selected a preview window will automatically launch.</p>

Key functions

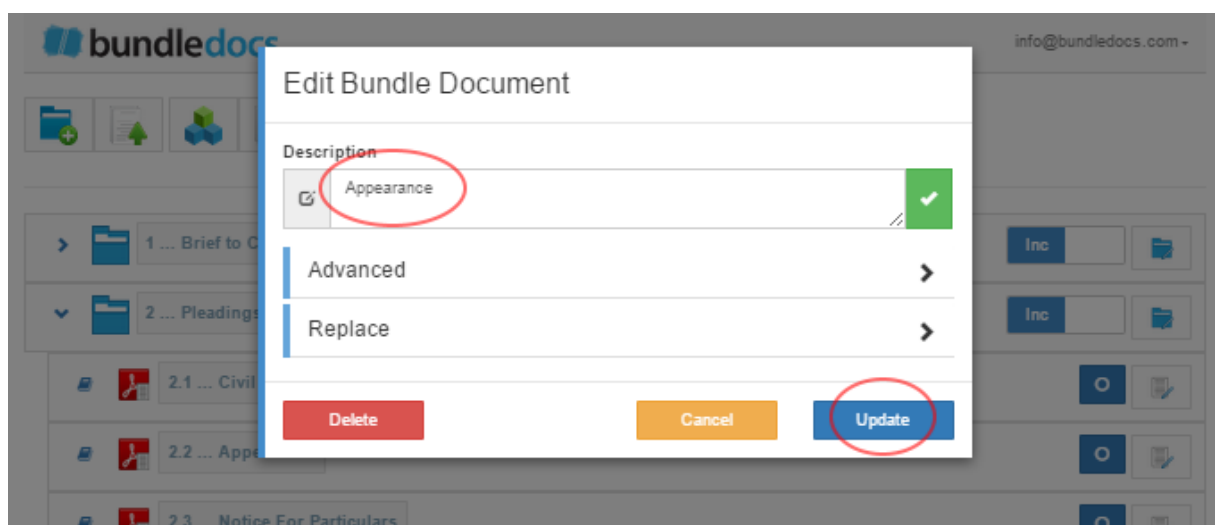
Utilise the 'Edit Details' Function

The 'Edit Details' button contains additional options that can be used to customise your bundle. Within Bundledocs there are two types of 'Edit Details' buttons.



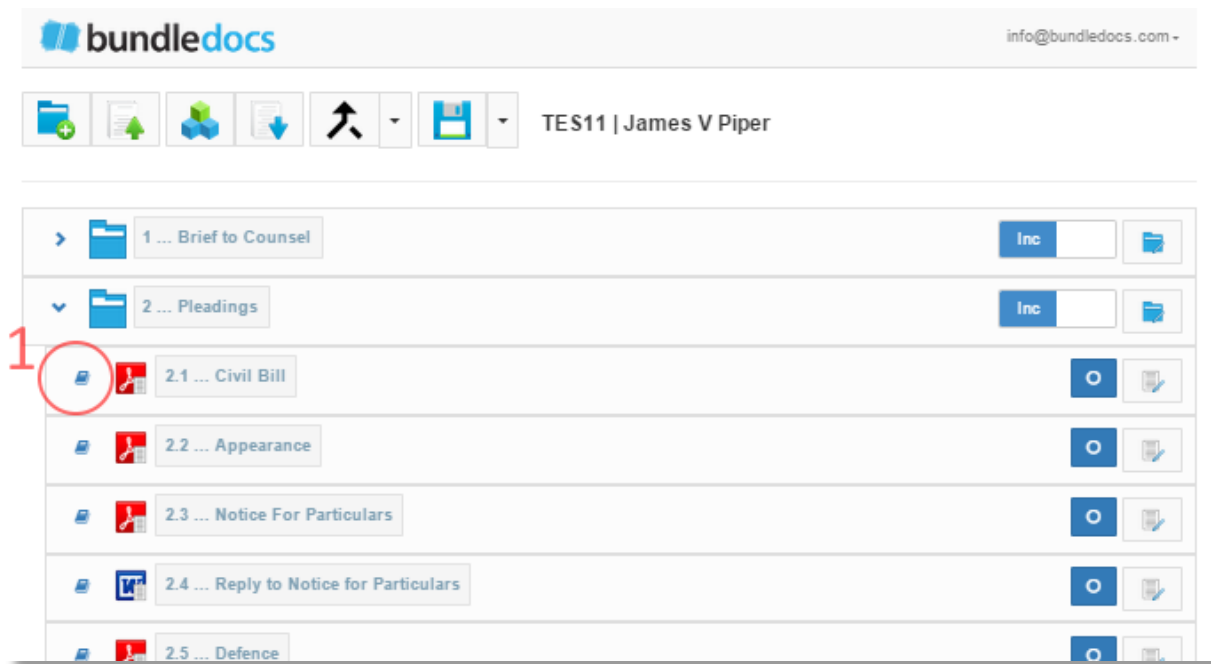
1. **Edit Section Details:** This is located to the right of every section created within Bundledocs and contains additional options for your sections.
2. **Edit Document Details:** This is located to the right of every document uploaded into Bundledocs and contains additional options for your documents.

Re-Name Sections or Documents

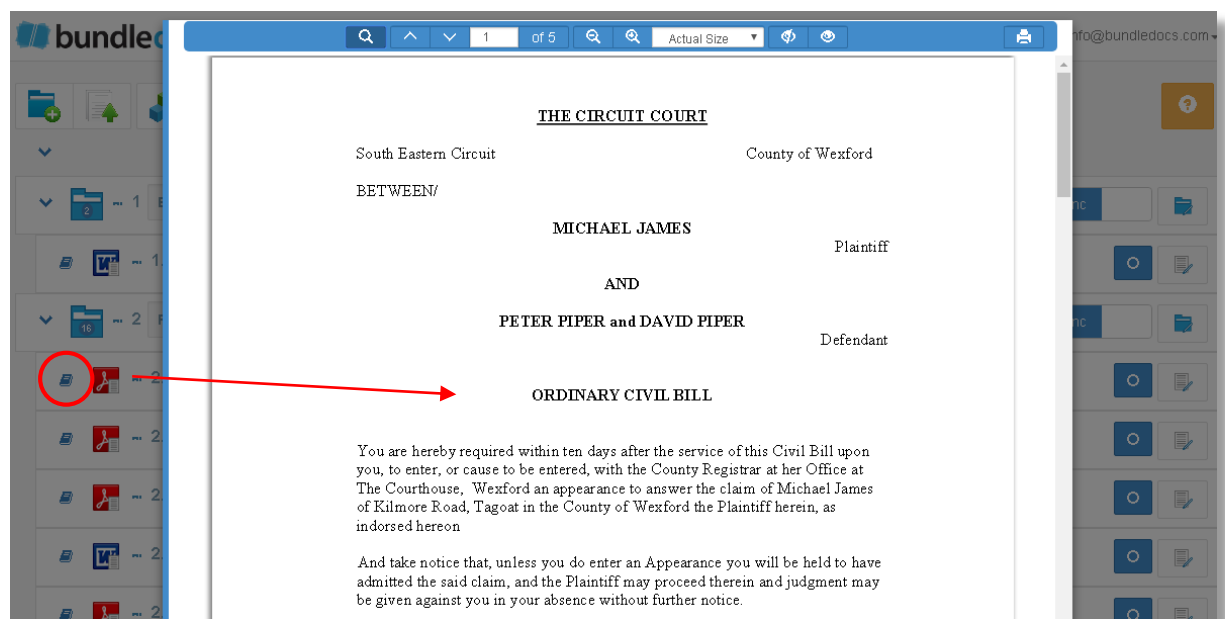


1. Within our Bundledocs App, any section or document can be easily re-named either double clicking or by simply selecting the 'Edit Document Details' icon. A window will automatically appear enabling you to re-name your document.

Preview Any Document Uploaded

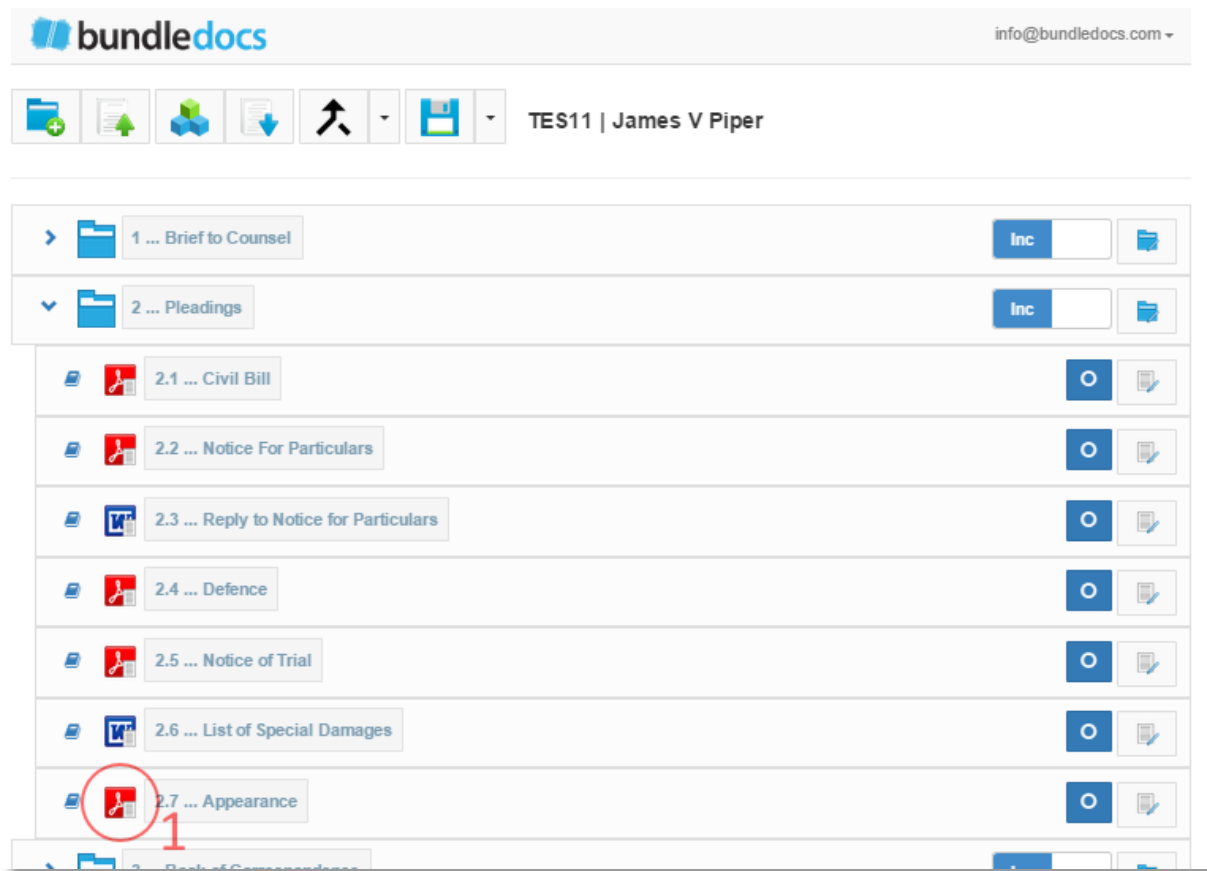


1. Select the 'Preview Document' icon. This is located to the left of each document uploaded, as shown above.



1. A preview window will immediately appear. Easily review or even download this document.

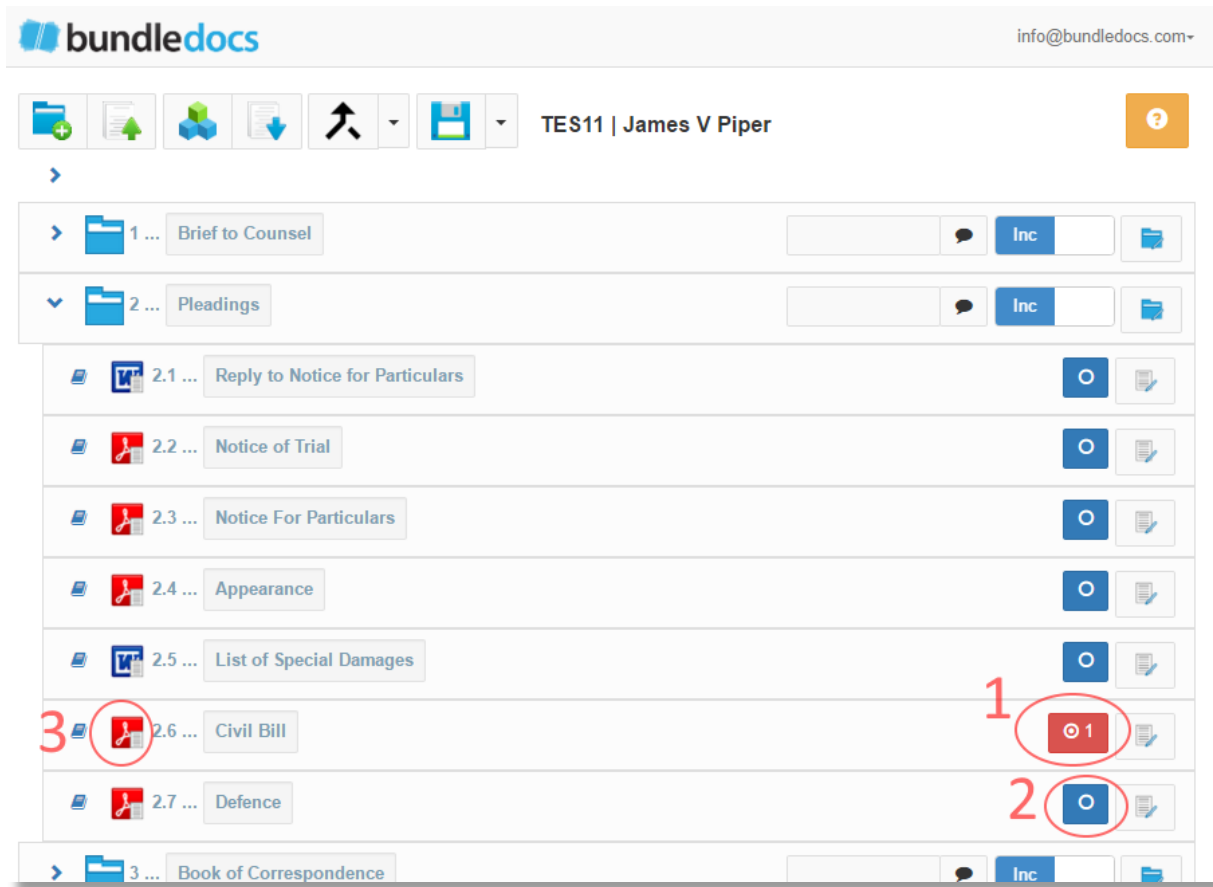
Move / Arrange Documents



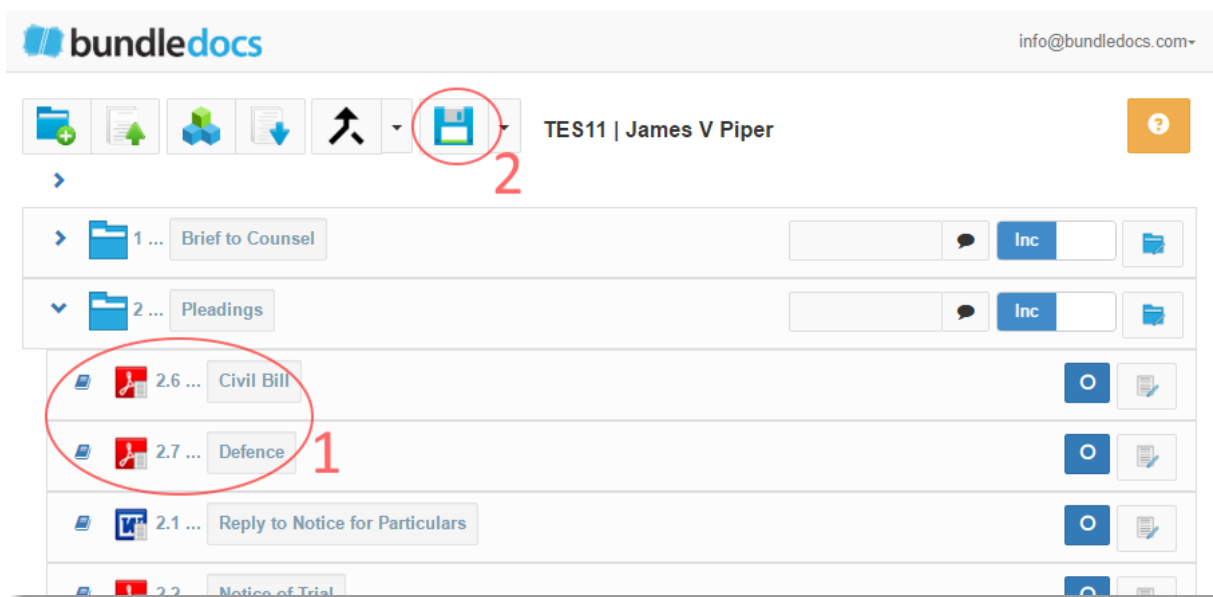
1. Select the File Type Icon to move any document within the Bundledocs App. To move simply select the icon (as shown above) and move the document into the correct location.

Remember: Click 'Save' to automatically re-number your document.

Selecting Multiple Items

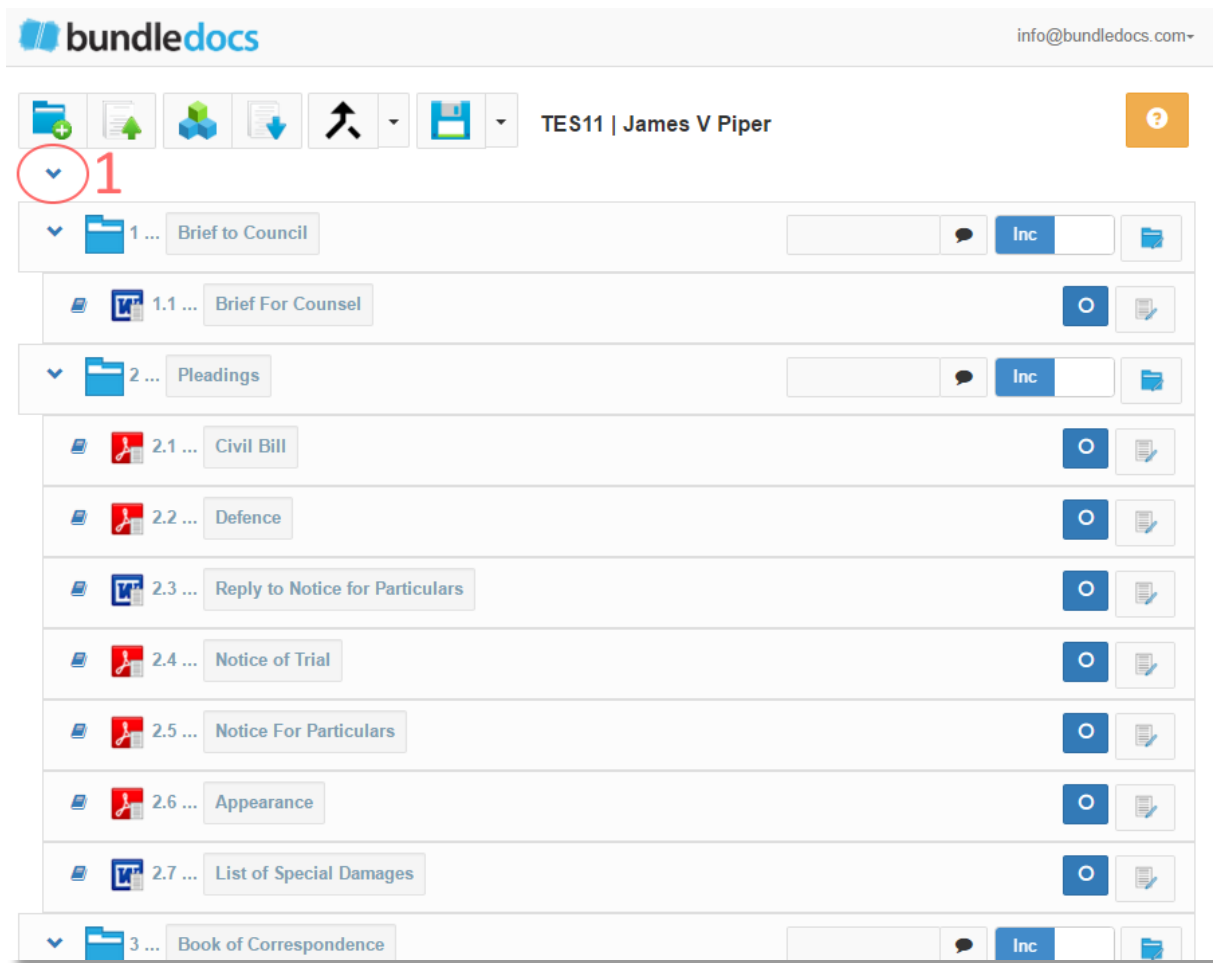


1. Select the files you want to move. Once a file is selected the icon will appear in red.
2. Select additional files to move more than one file at a time.
3. To move any selected file, select the file type icon, as shown above.



1. Once selected, simply drag and drop into the relevant location. Files will be moved in the order in which they are selected.
2. Remember to press 'Save' to update the new order and numbering.

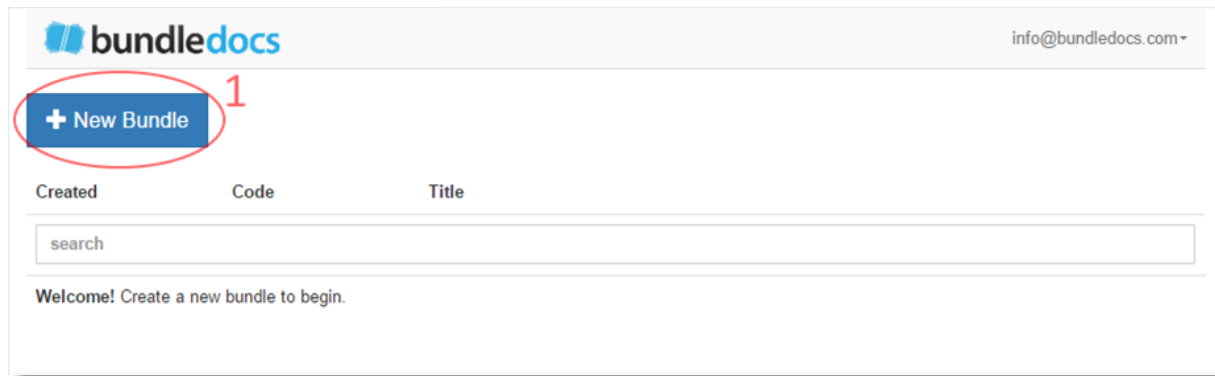
Expand/Collapse All Sections



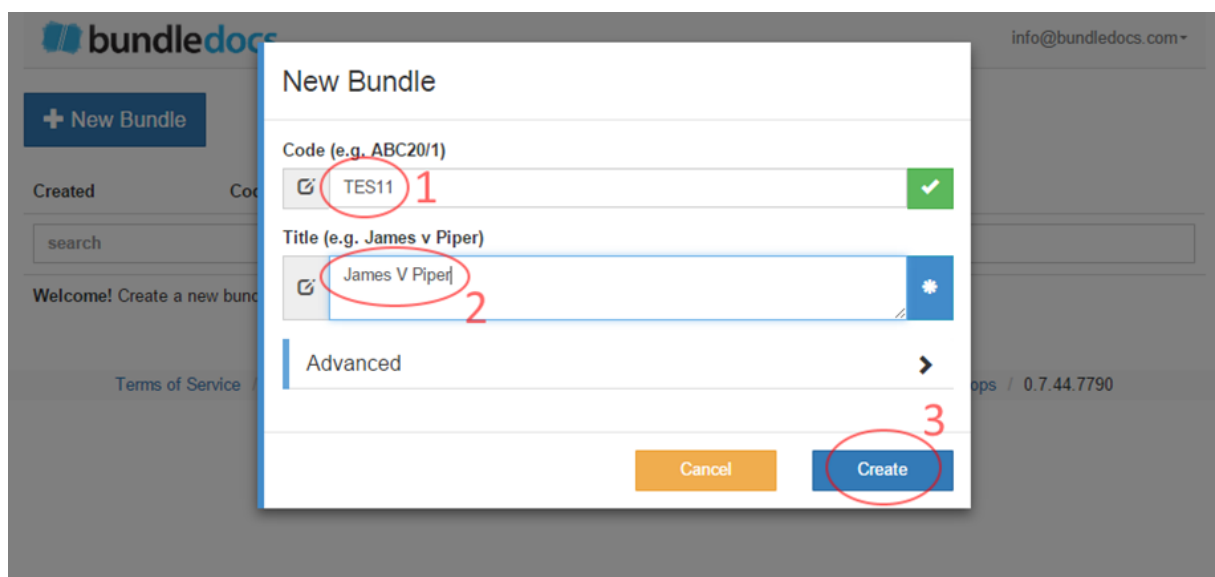
3. To quickly close all open tabs, simply select the arrow icon, as shown above. This will instantly close all open tabs. Similarly, if you would like to quickly open all closed tabs, simply select this icon again. This is a great feature when working with large bundles.

Create a Simple Bundle:

Create a new case

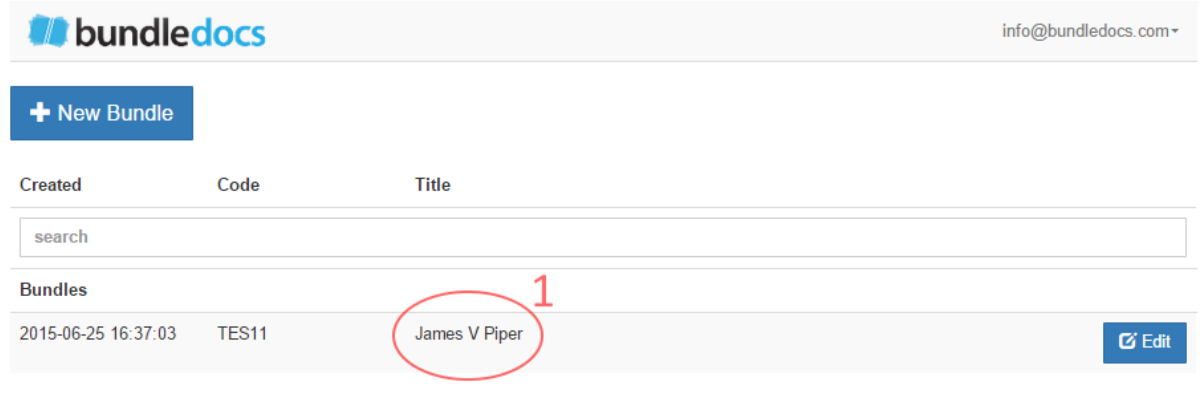


1. To create a new case click on the 'New Bundle' button, as highlighted above.



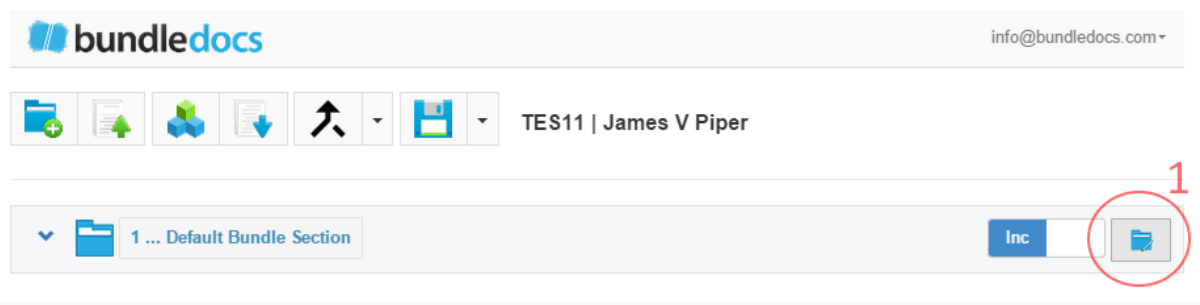
1. You must give your case a Unique Code (eg. a file reference)
2. Your case must be given a Case Title.
3. Click 'Create' to create your new case.

In our example a new case has been created with a case code of “TES11” and a case title of “James V Piper”. Click once on the Case Code or Title to enter your case and proceed to create your first bundle.

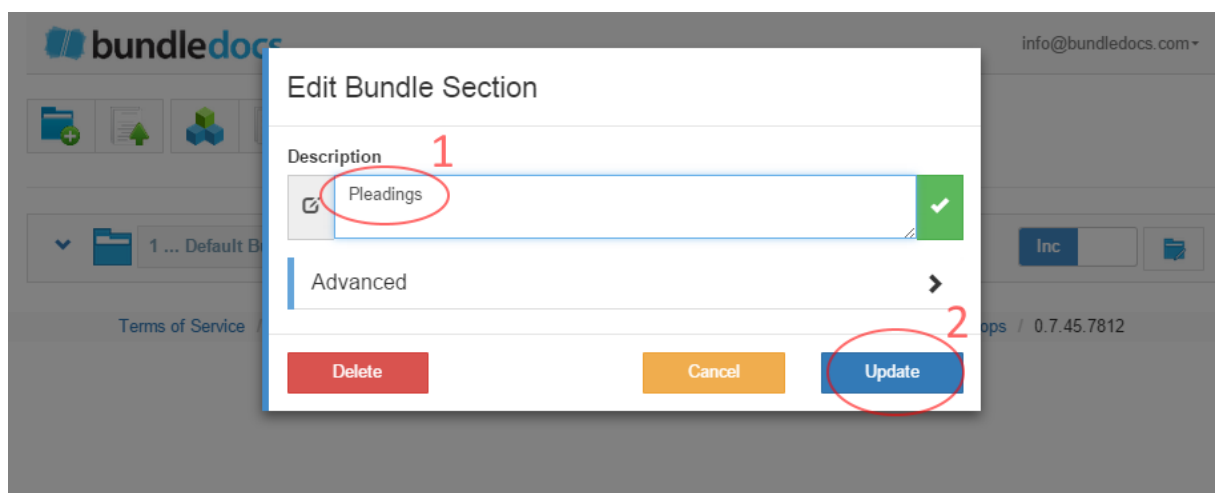


Re-name default bundle section

To begin creating our bundle, first we will re-name our ‘Default Bundle Section’.



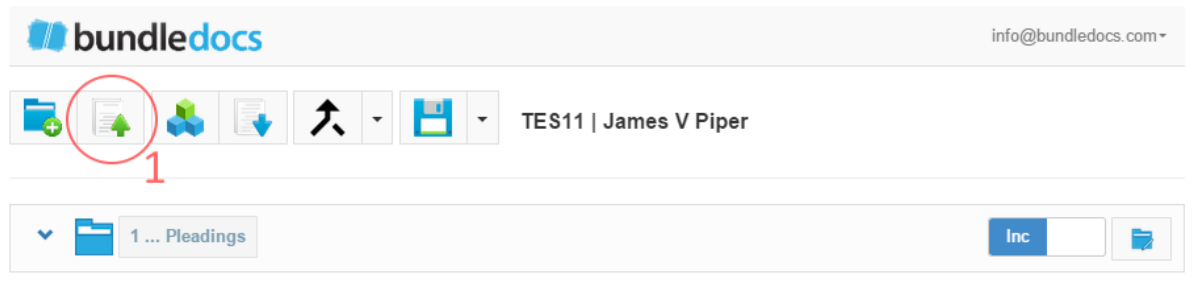
1. To re-name the ‘Default Bundle Section’ simply double click on the name. Alternatively, click the ‘Edit Details’ button (as shown above). A window will then appear.



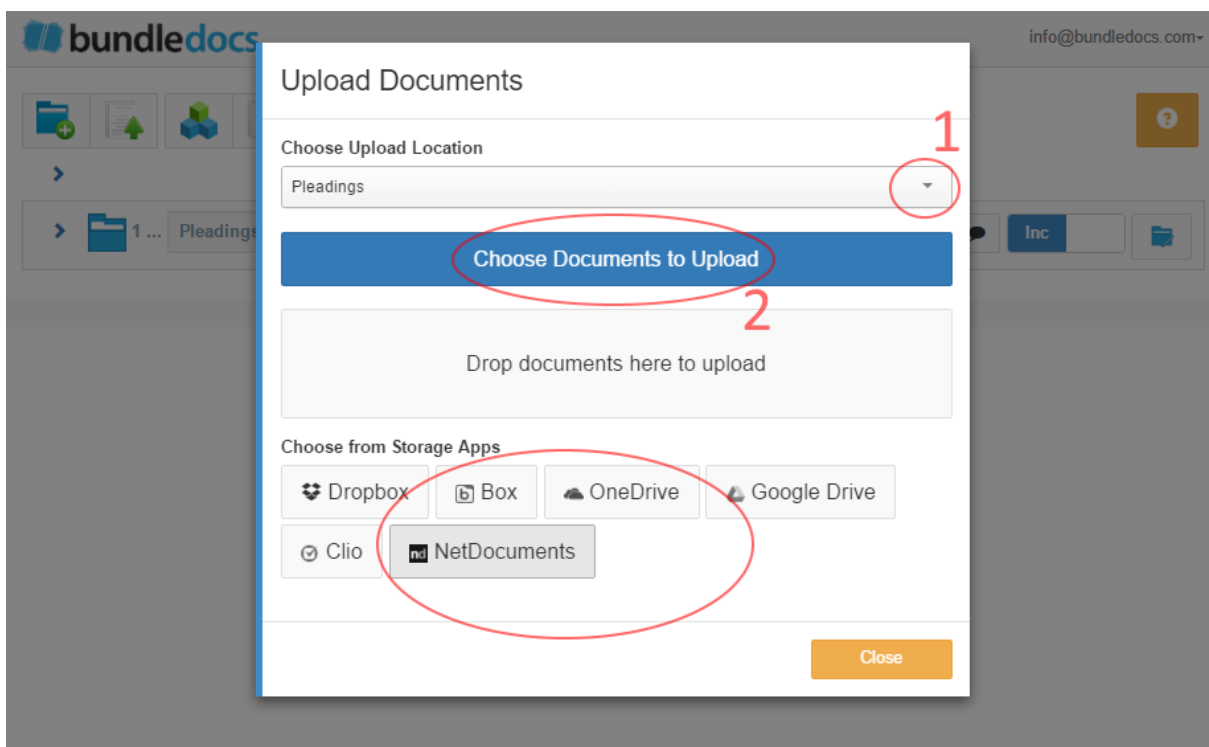
1. Type the new name within the field provided. For example: “Pleadings”
2. Select ‘Update’

Upload documents

Next, we need to upload documents into our folder entitled 'Pleadings', which we have just re-named. Remember, at Bundledocs we integrate with a number of solutions including Dropbox, OneDrive, Clio etc.

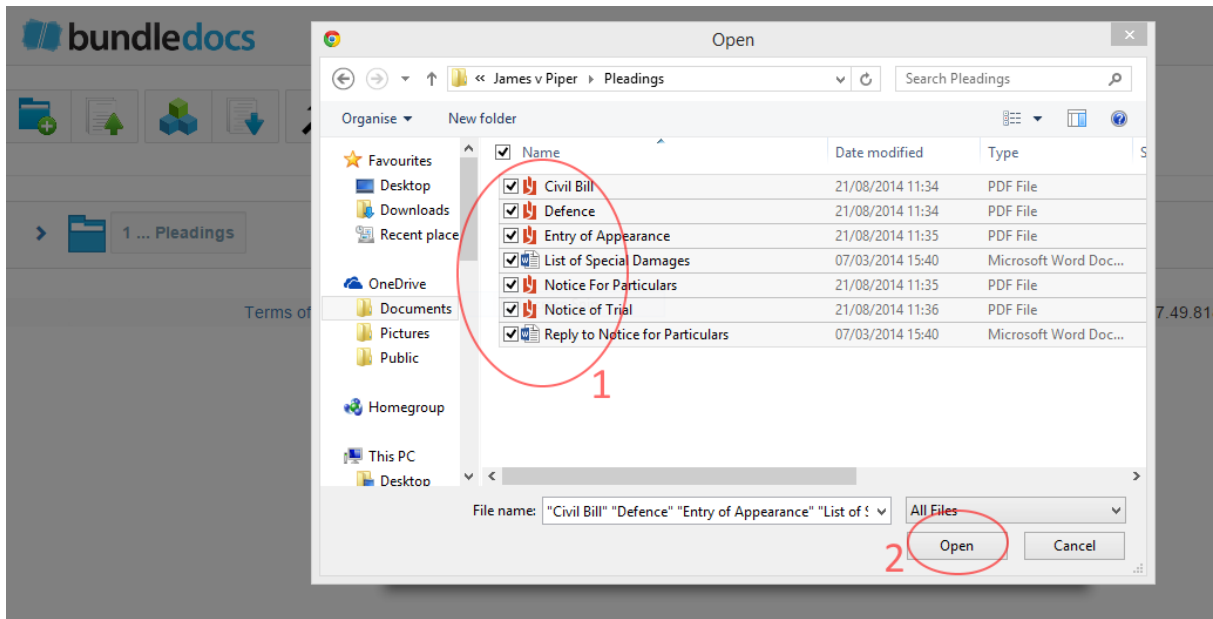


1. Click here to upload documents into your bundle.

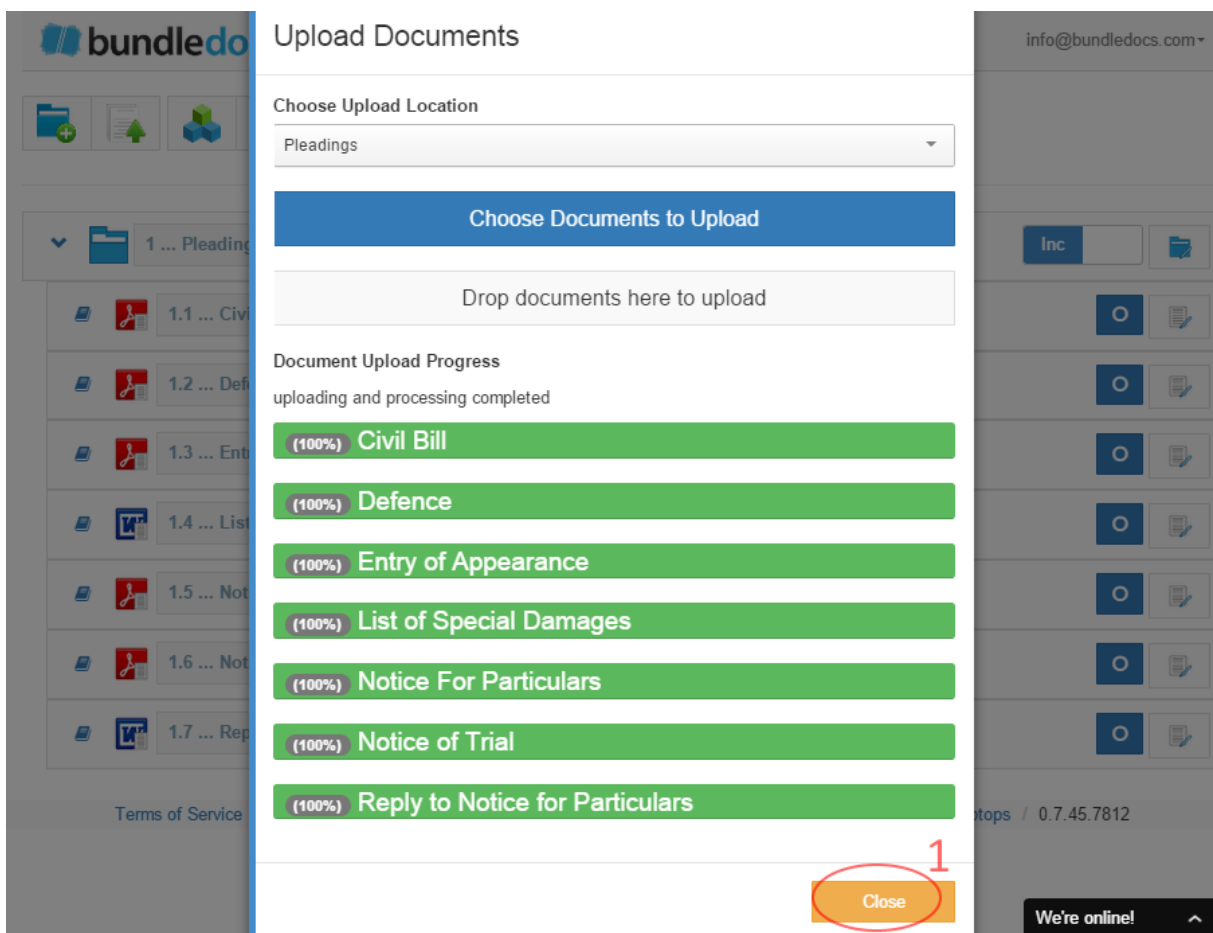


1. If you have created more than one section, select the section in which you would like to upload your documents from the dropdown. In our example we will upload into our 'Pleadings' section.
2. Click on 'Choose Documents to Upload', a window will then appear enabling you to upload your documents.

Note: Easily upload from our integration partners by selecting the required icon above For example: Dropbox, Box, OneDrive or Google Drive



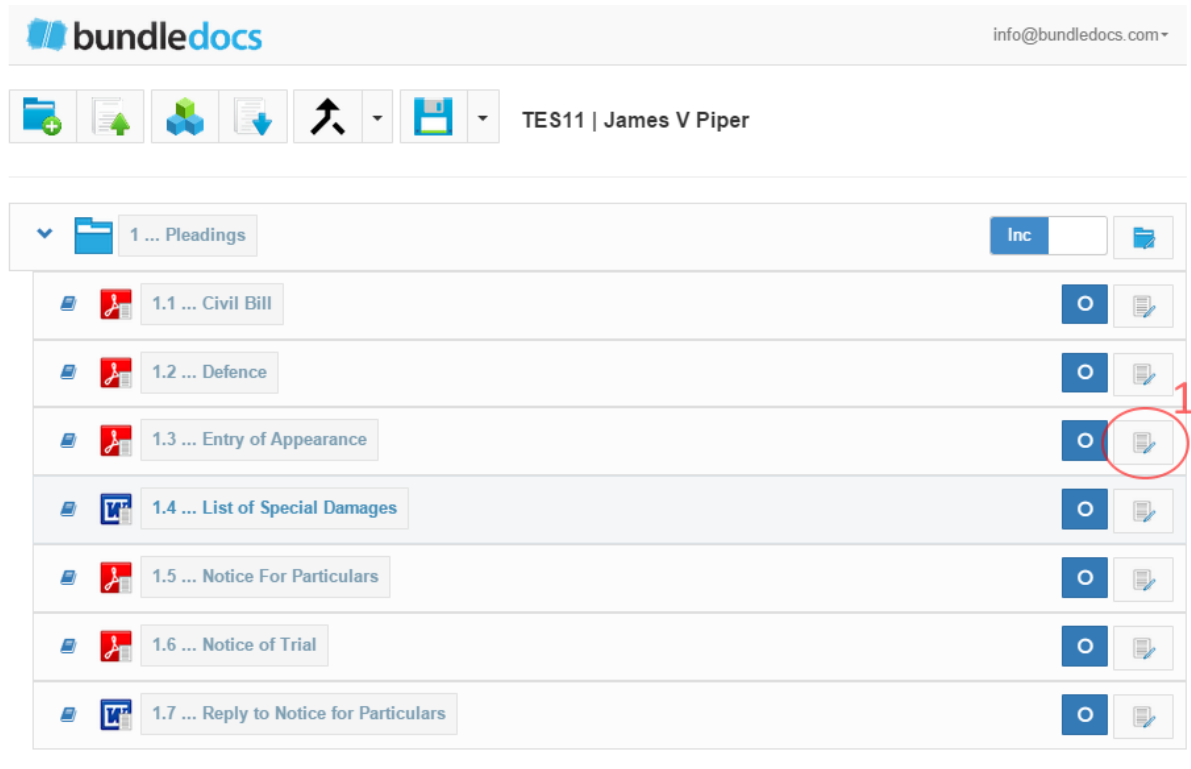
1. Select the files you wish to upload
2. Click Open to upload your files.



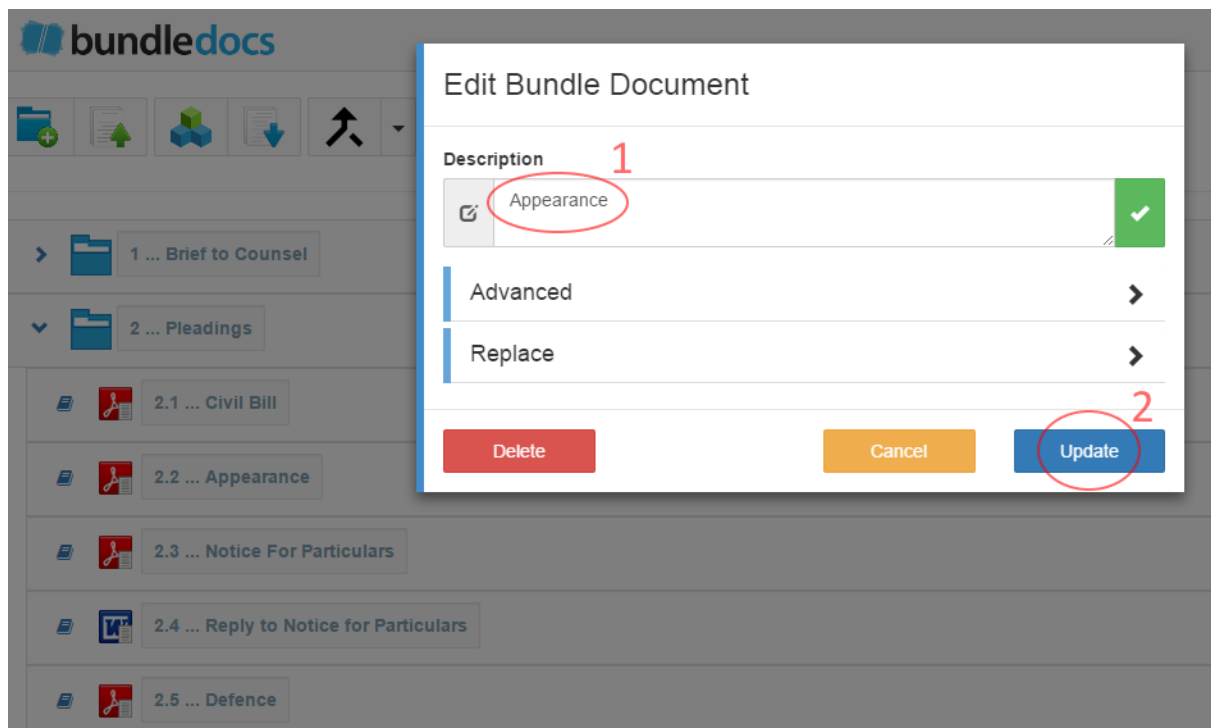
1. Once your files have successfully uploaded i.e. reached 100%, click 'Close'.

Re-name uploaded documents

A document can be easily re-named by simply selecting the 'Edit Details' icon.



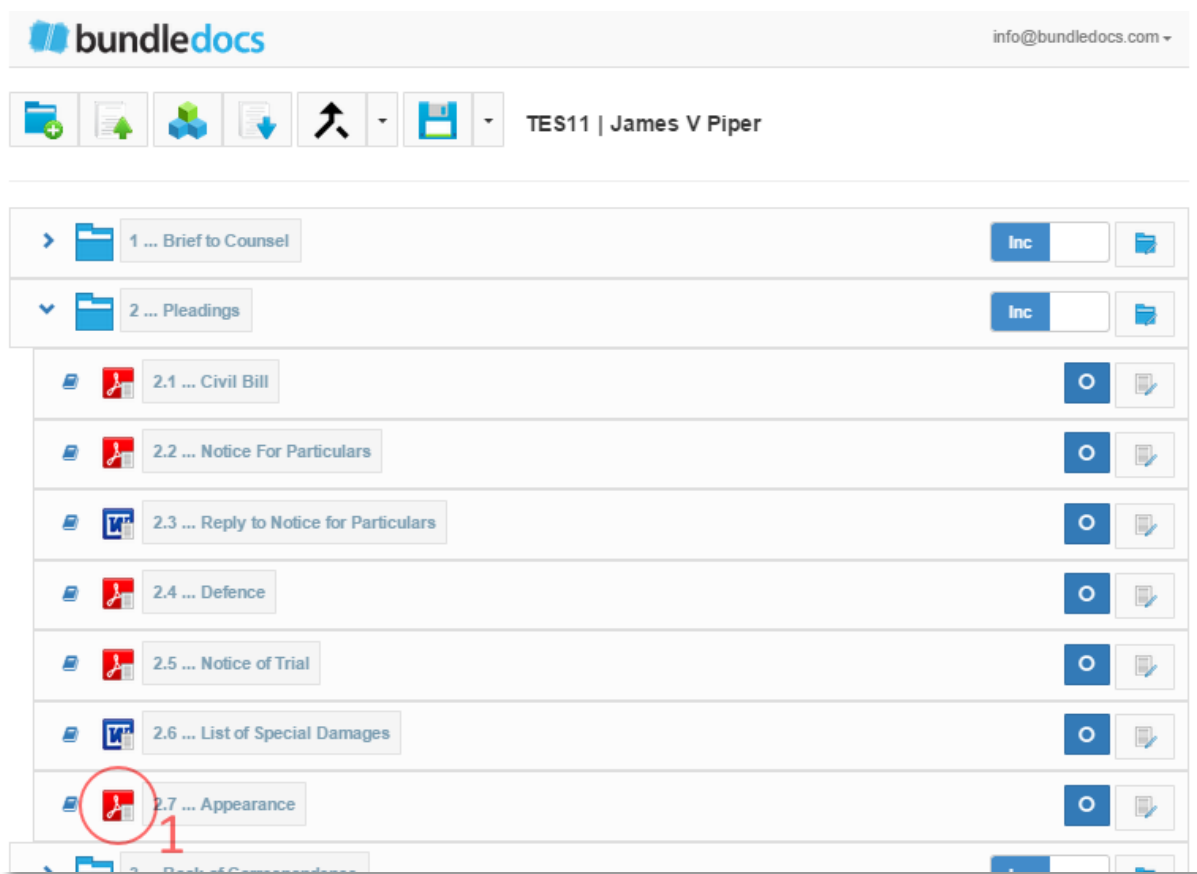
1. Double click on any document to easily re-name. Alternatively you can select the 'Edit Document Details' icon. A window will then appear.



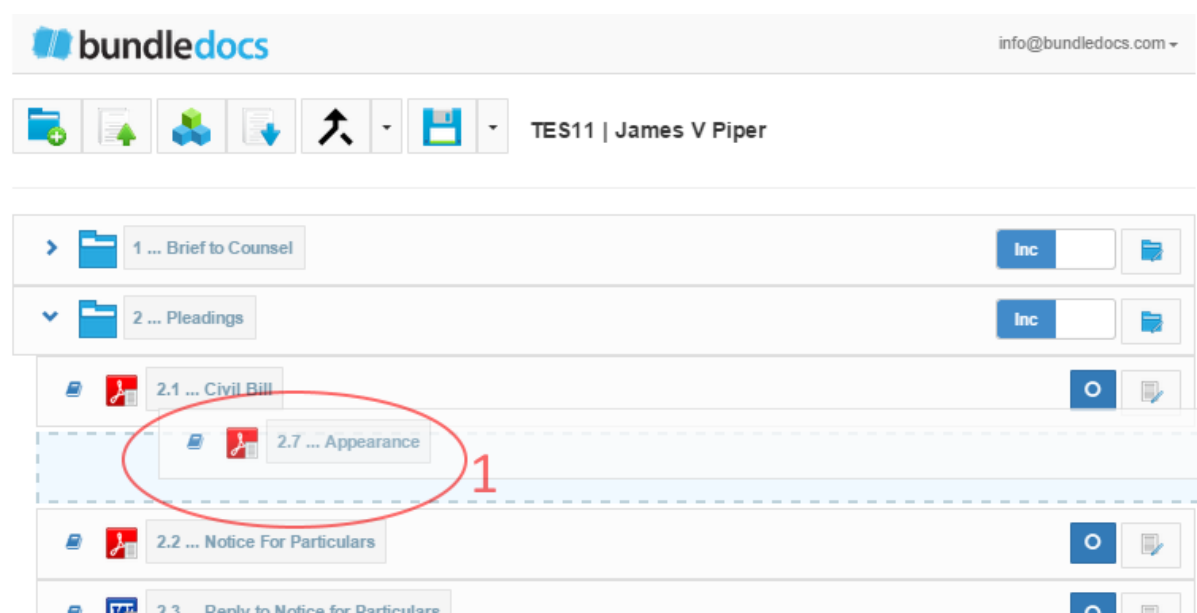
1. Type the new name within the field provided. For example: "Appearance"
2. Select 'Update'

Re-order documents

In order to get your bundle looking the way you want you may wish to change the order in which the documents appear. This can be done easily by using the drag and drop method as shown below.

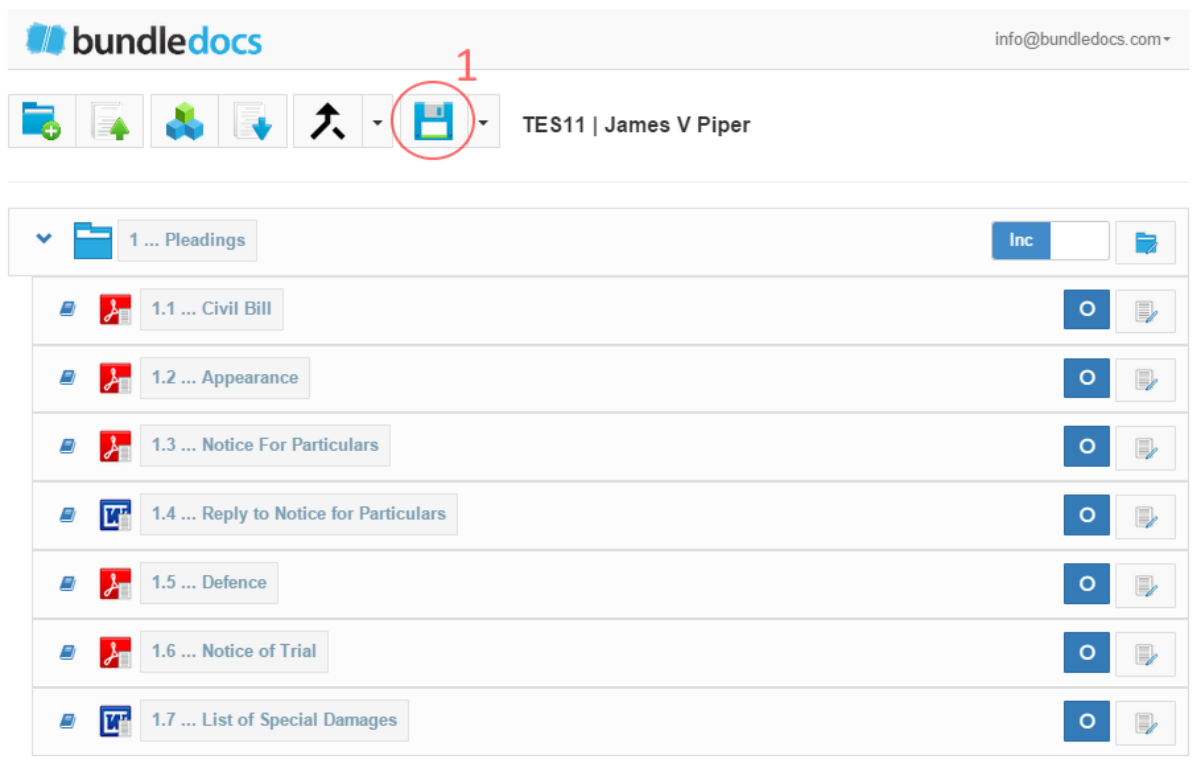


1. Select the File Type Icon to move any document within the Bundledocs App. To move simply select the icon (as shown above) and move the document into the correct location.



1. Drag the document you want to move.
2. Drop the document where you now wish to move it to.

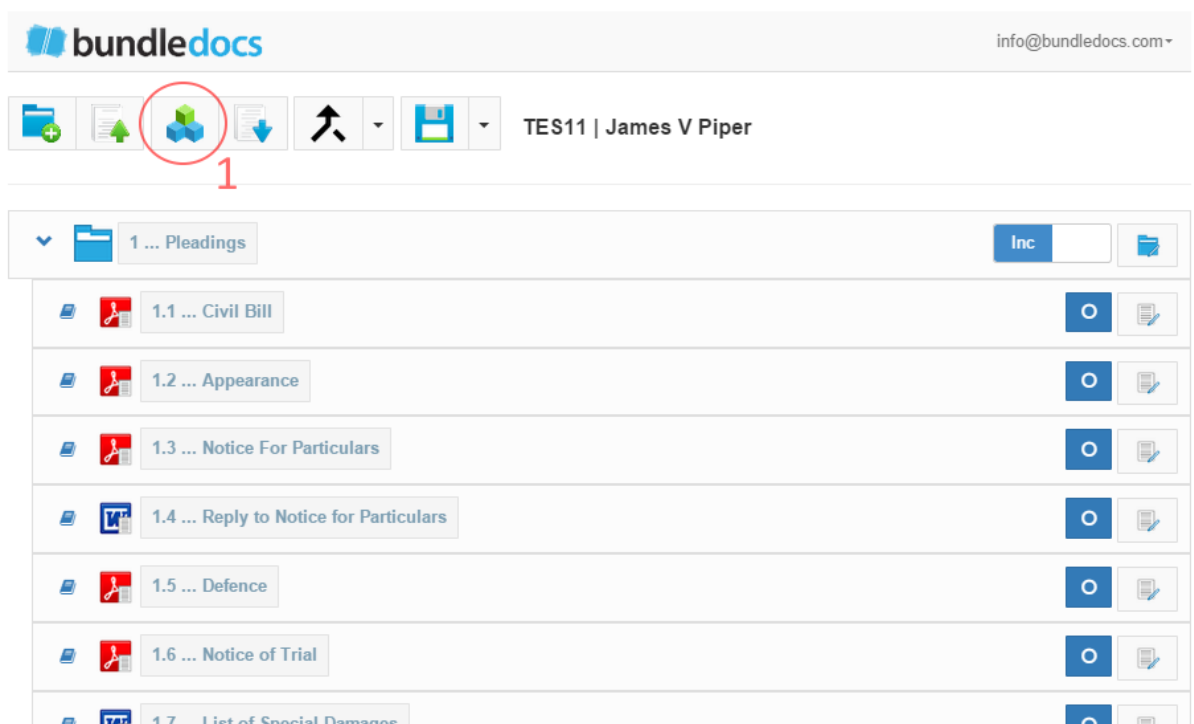
Save changes



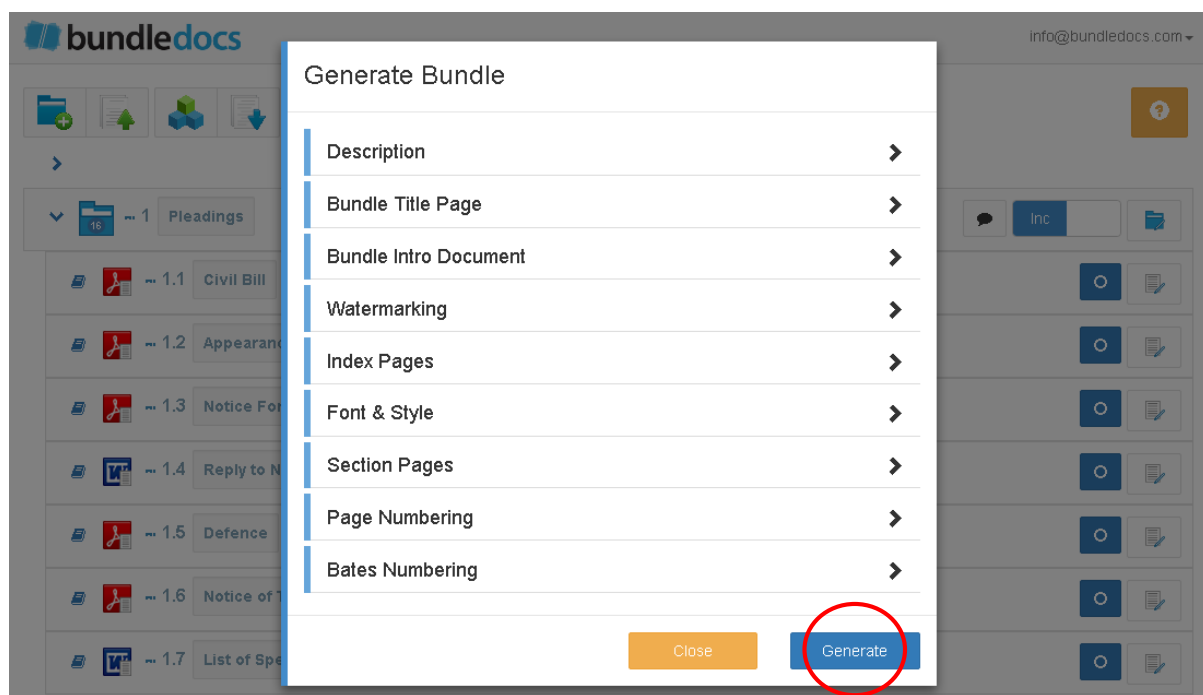
1. Click here to save any changes.
Remember if you make any changes to your bundle, for example, move documents or sections, it is important to save your changes. Simply click the save button. This will automatically re-order your bundle and ensure it is up-to-date.

Generate your bundle

In order to produce our bundle it must first be 'generated'.

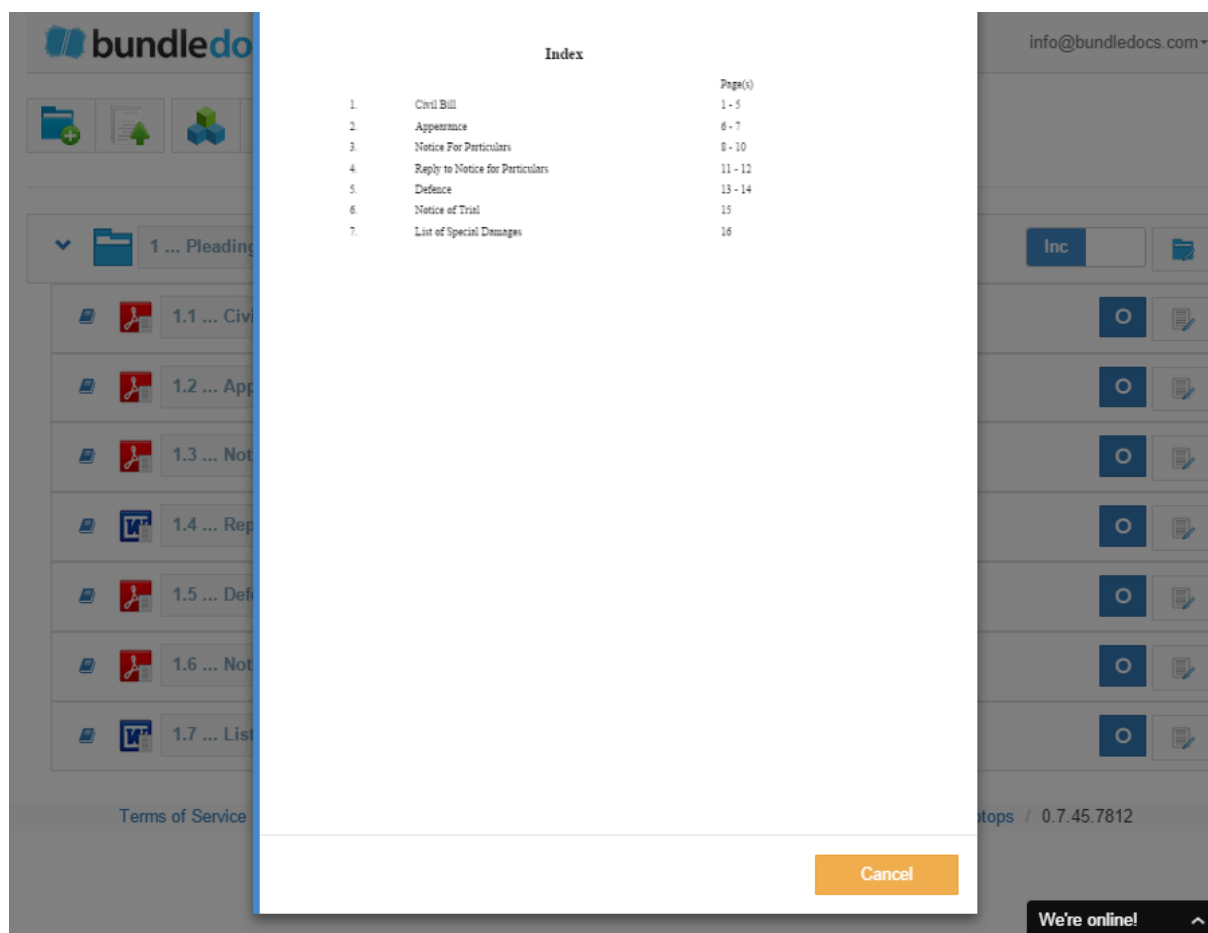


1. Once you are happy with your bundle, click here to generate and complete it.



1. The Generate window will then appear. In this example we will create a simple bundle, we will explain these Generate options later in the manual. Click here to generate your bundle.

Preview completed bundle



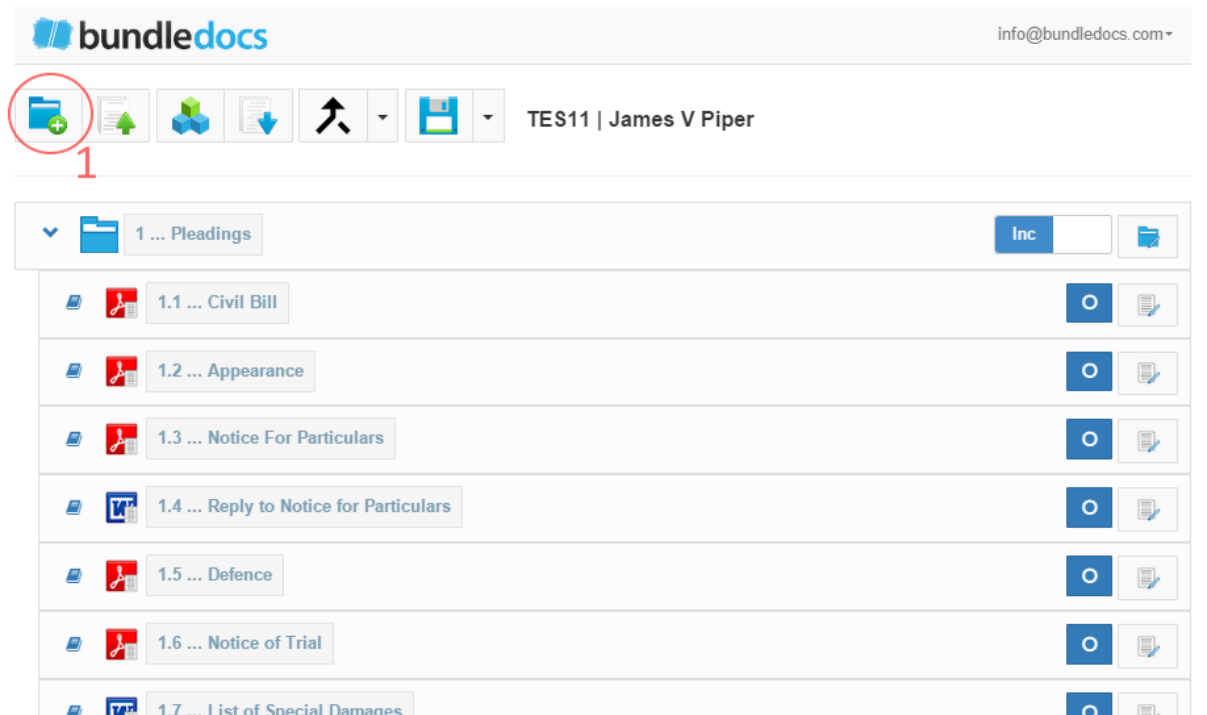
1. Wait while your bundle is being generated. Once the process is completed, a preview of your bundle will then appear (as shown above). Within this you will be able to preview your completed bundle and see that it has been automatically indexed, paginated, sectioned and hyperlinked.

Note: When your bundle has completed generating, Bundledocs will automatically email you. Once you receive this email, you will know your bundle is now available and ready to download. So simply hit the generate button and let Bundledocs do the hard work!

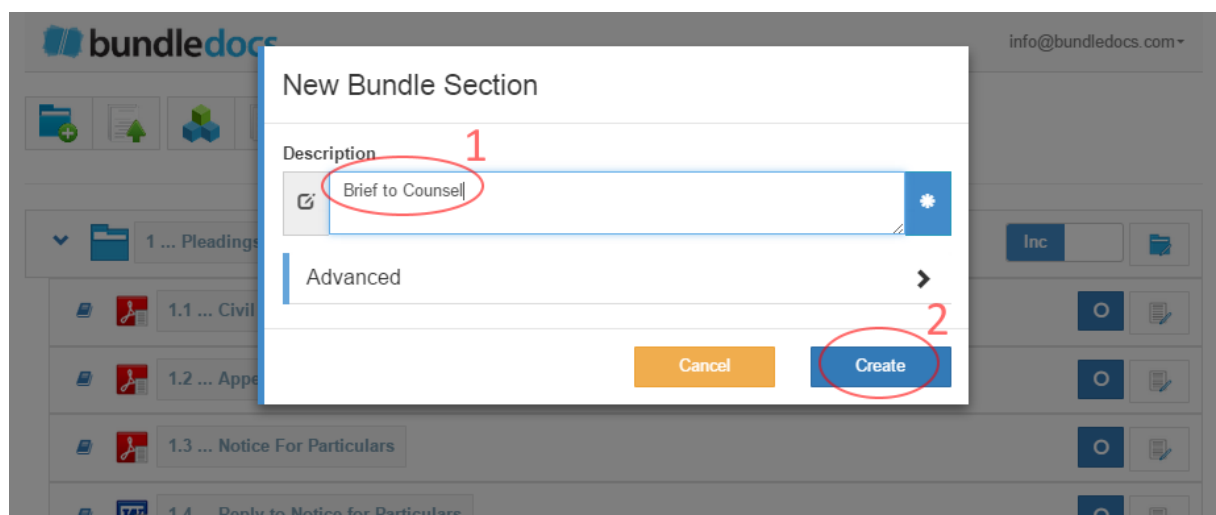
Build your Bundle:

Create Sections:

Add additional sections



1. You can create multiple sections for your bundle by clicking here.



1. Give each new section its own description. Documents can be dragged and dropped directly into the suitable section of the bundle.
2. Click 'Create'.

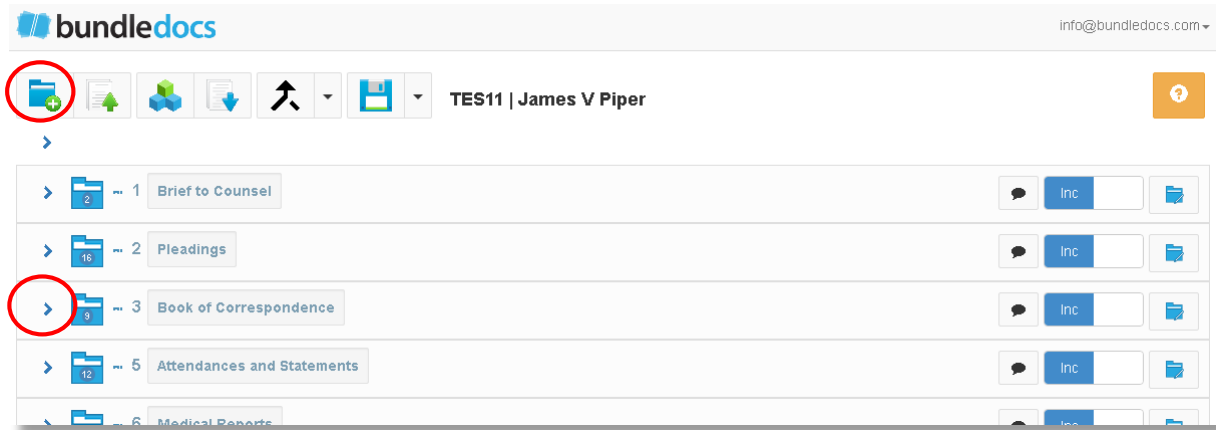
You can have as many sections in your bundle as you wish. Sections can be changed, added to or removed, as shown below.

The screenshot shows the bundledocs interface. At the top, there is a header with the bundledocs logo and the email address info@bundledocs.com. Below the header is a toolbar with icons for adding, deleting, and moving sections. The main area displays a list of sections in a bundle, each with a folder icon, a title, and an 'Inc' button. The sections are:

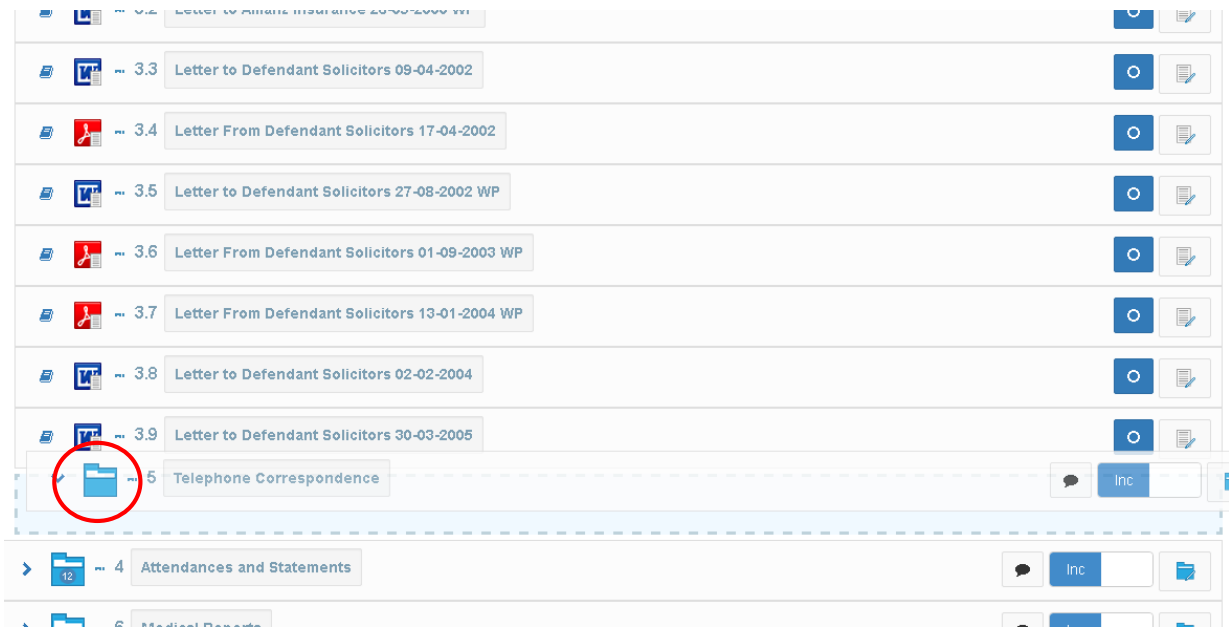
- 1 ... Brief to Counsel
- 2 ... Pleadings (circled in red with a red 1 next to it)
- 3 ... Book of Correspondence
- 4 ... Attendances and Statements (circled in red with a red 2 next to it)
- 5 ... Medical Report
- 6 ... Engineers Report

Create a sub-section (section within a section)

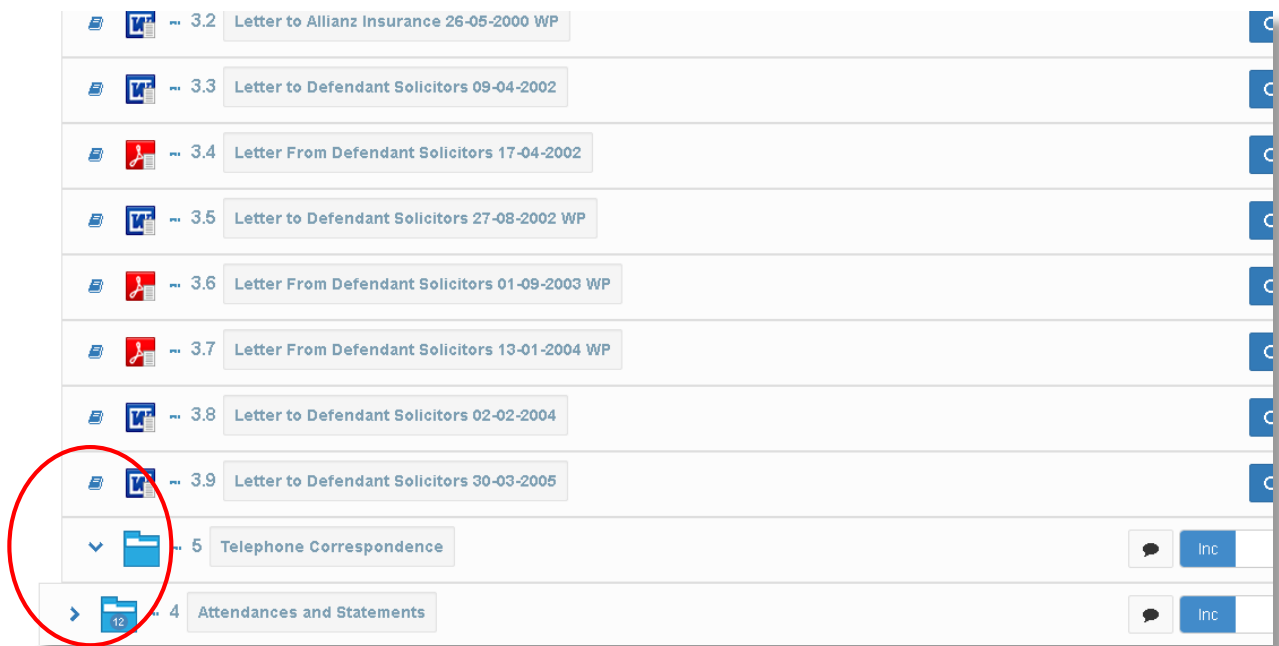
To create a sub-section, drag and drop the section you want to include into a previously created section. This will then become a sub-section. Remember to select save as you go. This will automatically re-number everything when moving sections and documents.



1. To create a sub-section, you will first need to create your section. In our example, we will create a section called "Telephone Correspondence".
2. Expand the section where you want to insert the sub-section. In our example we will expand the section 'Book of Correspondence'.

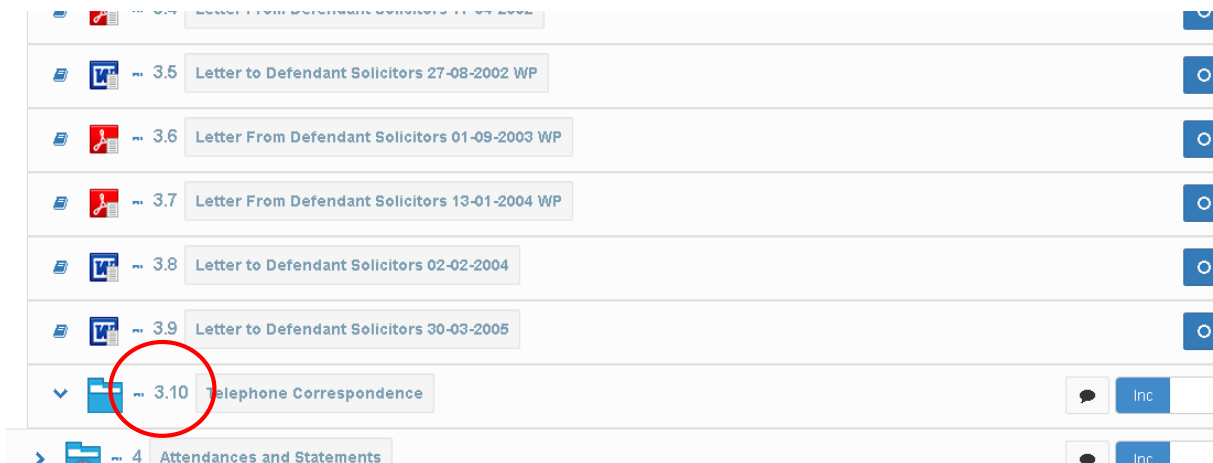


1. Select the section you want to move. In our example, we will move the 'Telephone Correspondence' section into the 'Book of Correspondence' section.



1. Drag the document into the new section. To ensure that the section is included as a sub-section (section within a section) ensure that the folder is aligned with other documents within that section, as shown above

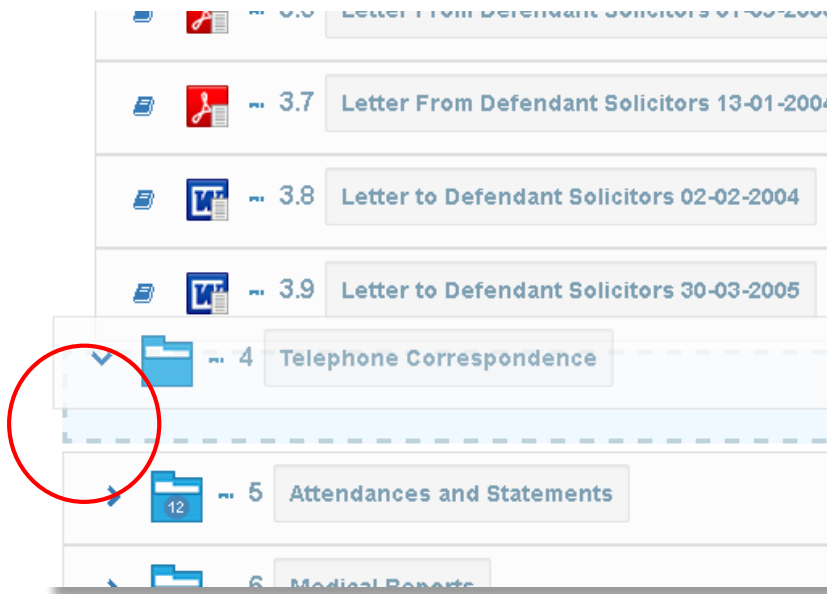
Note: You can easily see if you have created a sub-section by looking at your case. If a section is contained within another section it will be slightly indented, as shown above. As such, the section no longer appears in line with the folder beneath and instead appears beneath the other documents in the section.



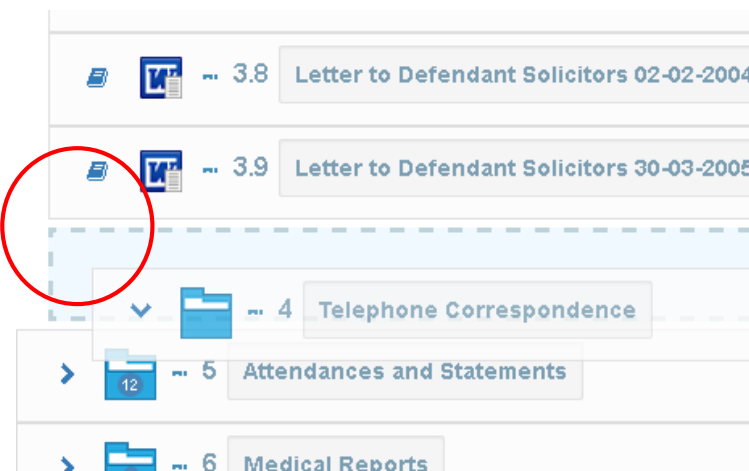
1. Select 'Save' to update the numbering.

Sub-Sections: Tip 1: Move files using Dash Lines

When moving sections or documents in Bundledocs the blue dash line will appear to help guide you. It is great when working with sub-sections.



1. **Section:** Here we can see the blue dash is currently in-line with the sections ie. is not indented.



1. **Sub-section:** Here we can see the blue dash is now in-line with the documents and is indented. This is now a sub-section. We will simply need to select 'Save' to update the numbering.

Even better, if we want to change this sub-section into a section again. We will simply need to move the folder to the left. As such, it will no longer be indented.

Sub-Sections: Tip 2: Drop Files with Indents

When working with sections, sub-section and even volumes it is important to note where our folders and documents are located. For this, we will look at the indents.



1. In the above example, we can see that the documents contained within our section appear to the right and are indented.

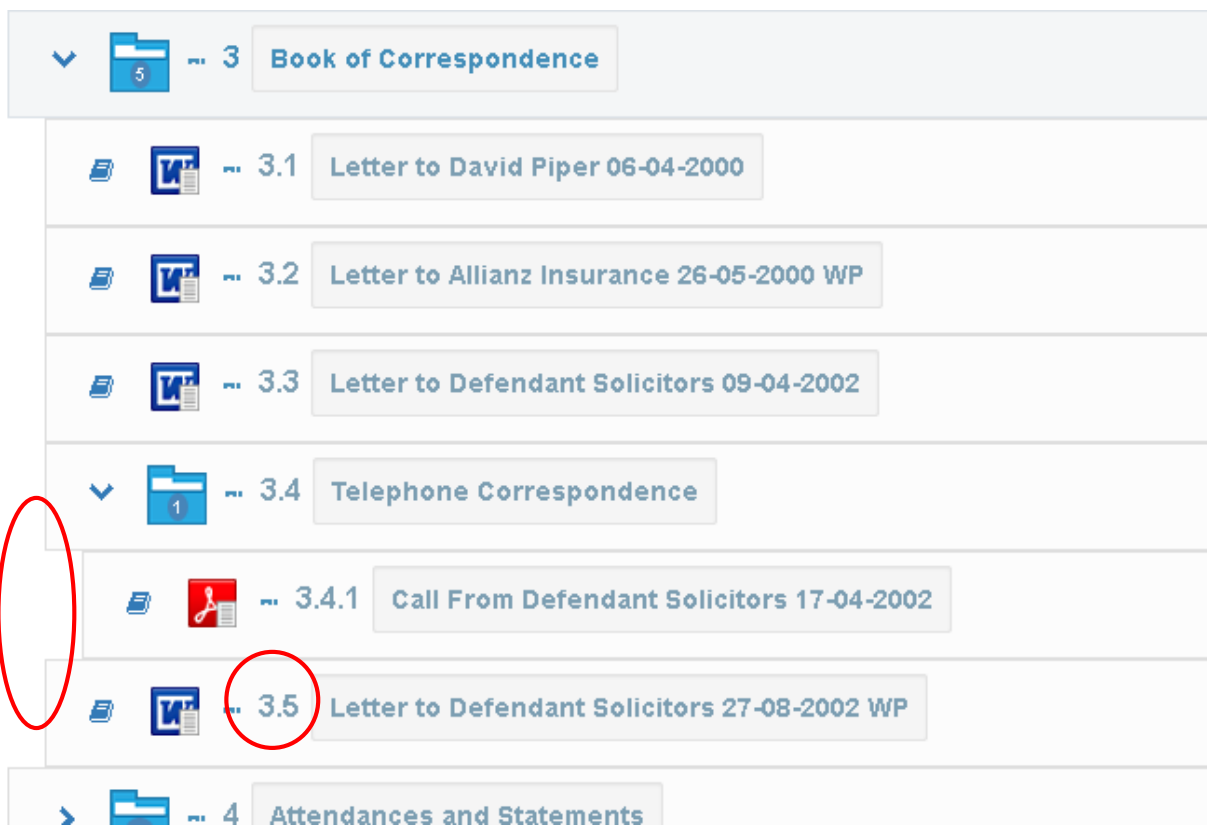


1. We have now created a sub-section. This sub-section is indented and appears to the right of our section ie. inline with the documents contained within this section.



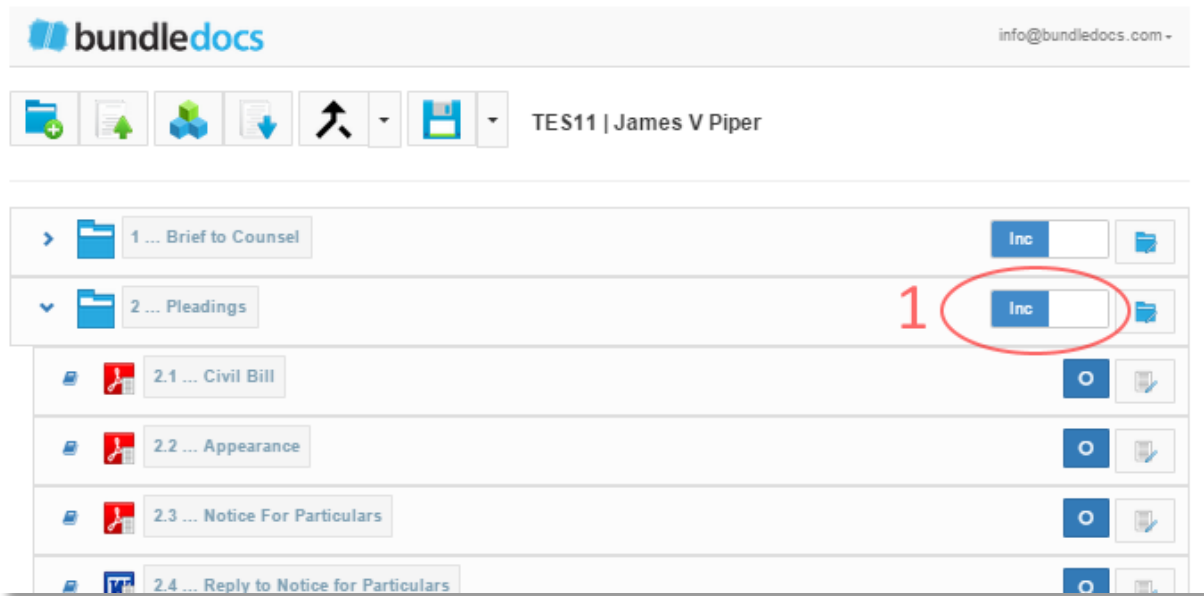
1. Similarly, documents added into a sub-section will need to be indented and appear to the right of our sub-section.

Top Tip: When adding documents to a sub-section, you will need to make sure that the section is expanded. This will allow us to add document into this section. When expanded the arrow will be pointing down.

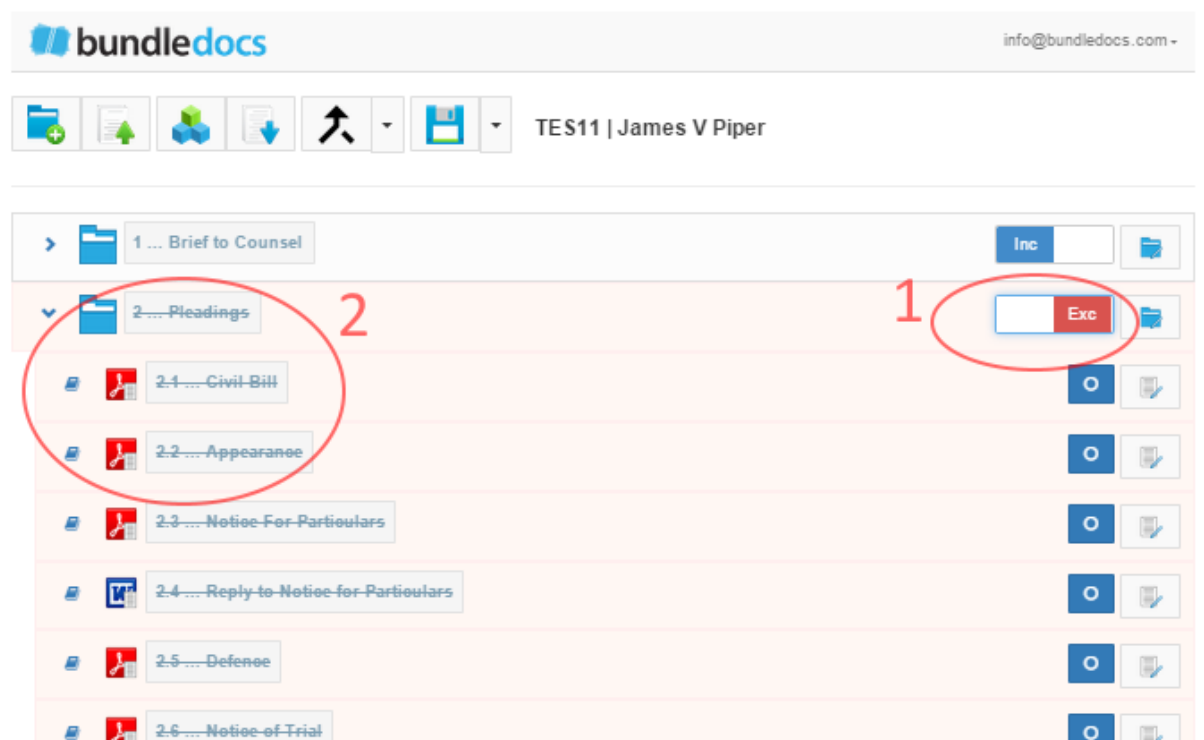


1. If a document contained within a sub-section is not indented further, it will instead be in-line with the section documents. This will be reflected in the numbering scheme.

Include/ exclude a section



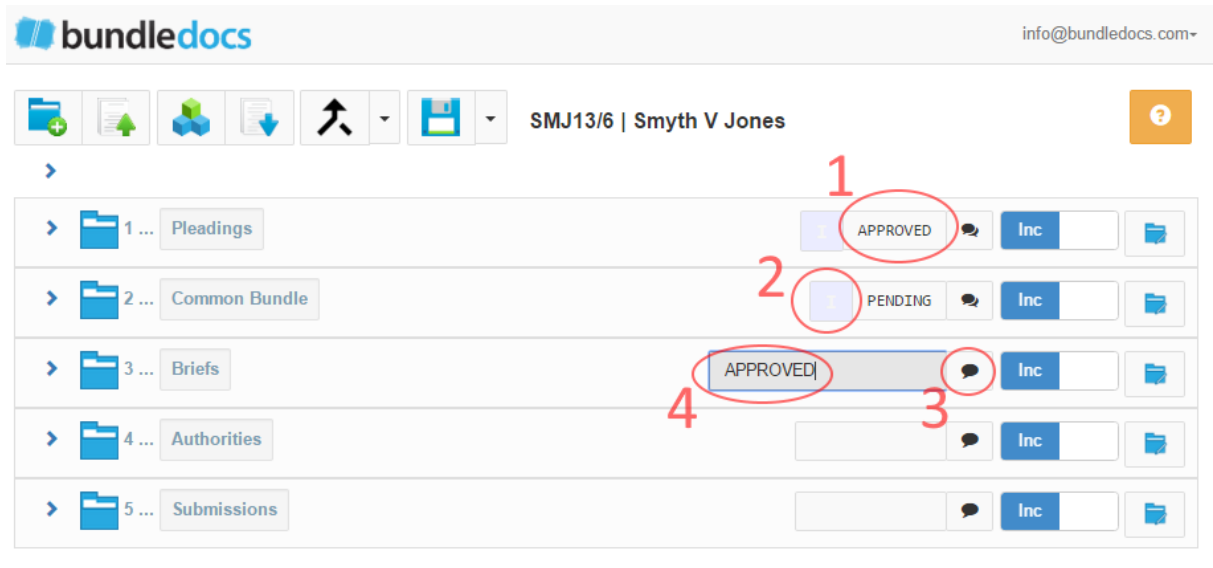
1. Select the 'Inc' icon, located to the right of each section. This will change a section from being included to excluded. If you need to revert, simply click the button again.



1. The red 'Exc' icon indicates that this Section is excluded from your bundle
2. Excluding a section automatically excludes all documents contained within this section from your completed bundle. Any section or document that is 'Excluded' will appear with a strikethrough within your account, as shown above.

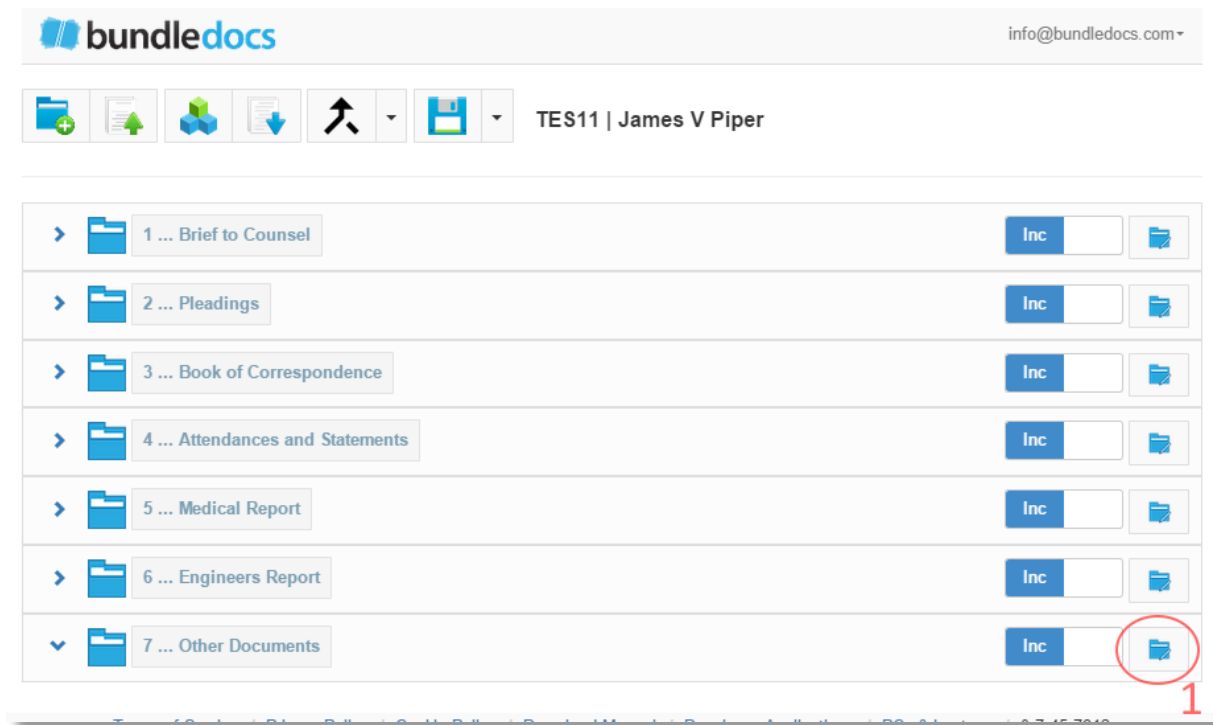
Add Comments to Sections

Bundledocs provides users with the option to write comments for particular sections. This is particularly useful when working with other team members to produce a bundle.

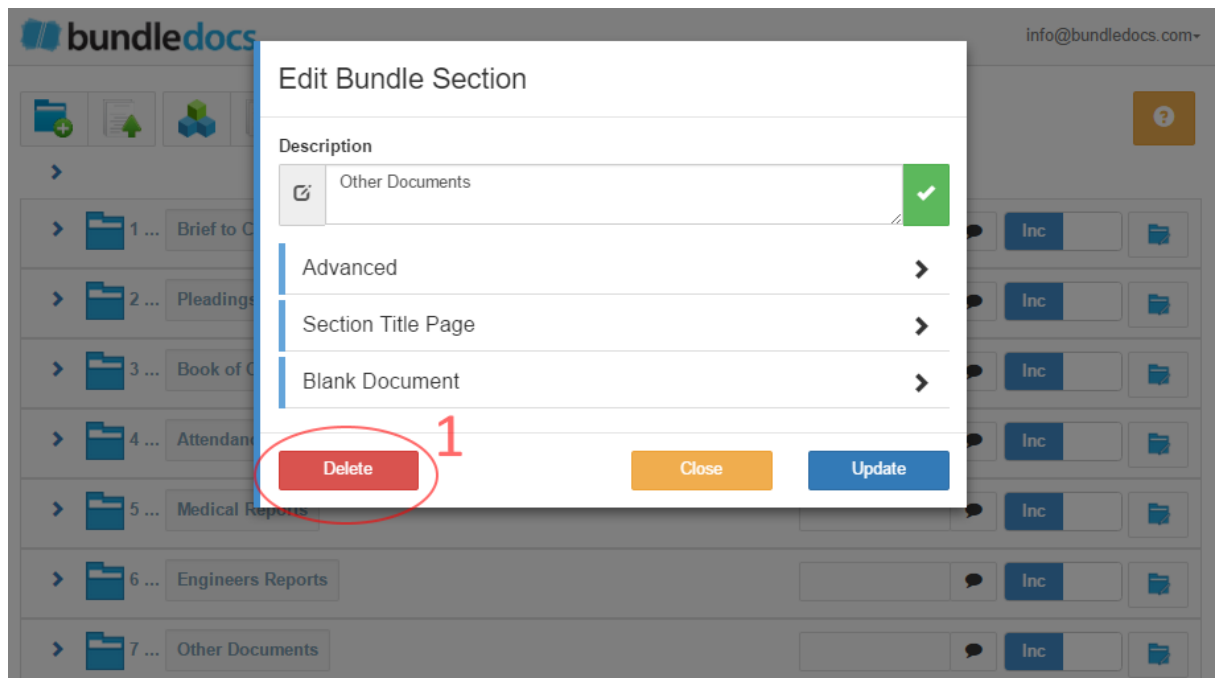


1. Type a comment within the area provided. For example: 'Approved'.
2. Once the comment has been written and saved, an identifier will appear to the right. This is used to indicate which user made the comment. In this example 'i' will appear to show that 'info@bundledocs.com' has made the comment. If there are other users with the same initial an alternative colour will be used.
3. To make a new comment, select the comment icon to enable editing, as highlighted above.
4. Once this is selected type a comment within the area provided. For example, 'APPROVED'. Please note: It is essential that you press return on your keyboard to save the comment or any changes that have been made to the comment.

Delete a section



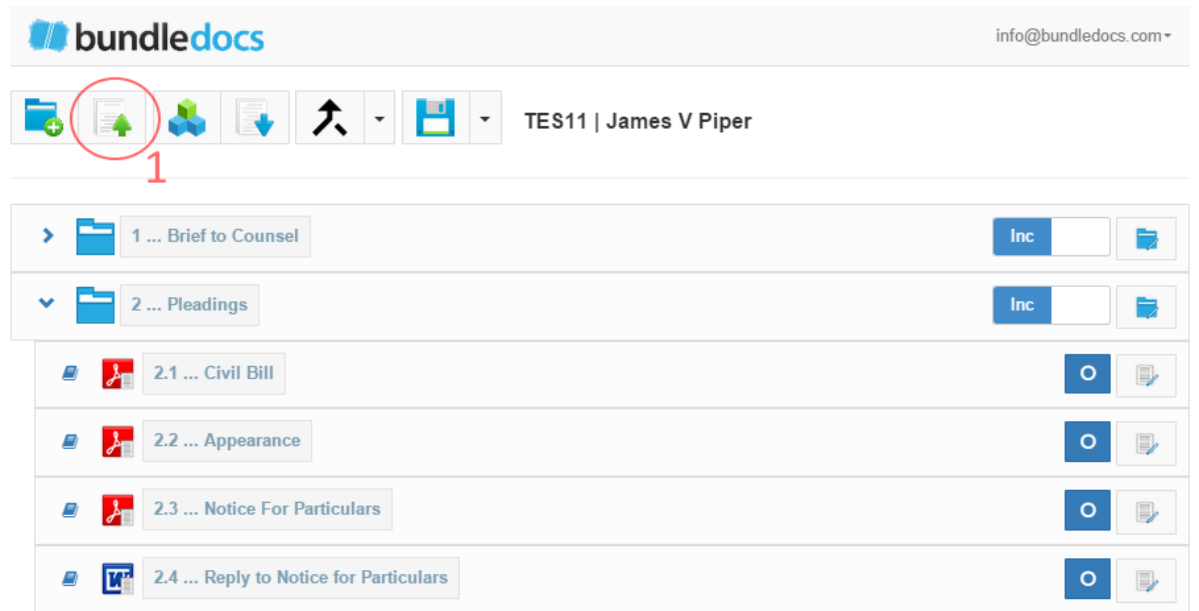
1. Select the 'Edit Details' icon, located to the right of each section. A window will appear.



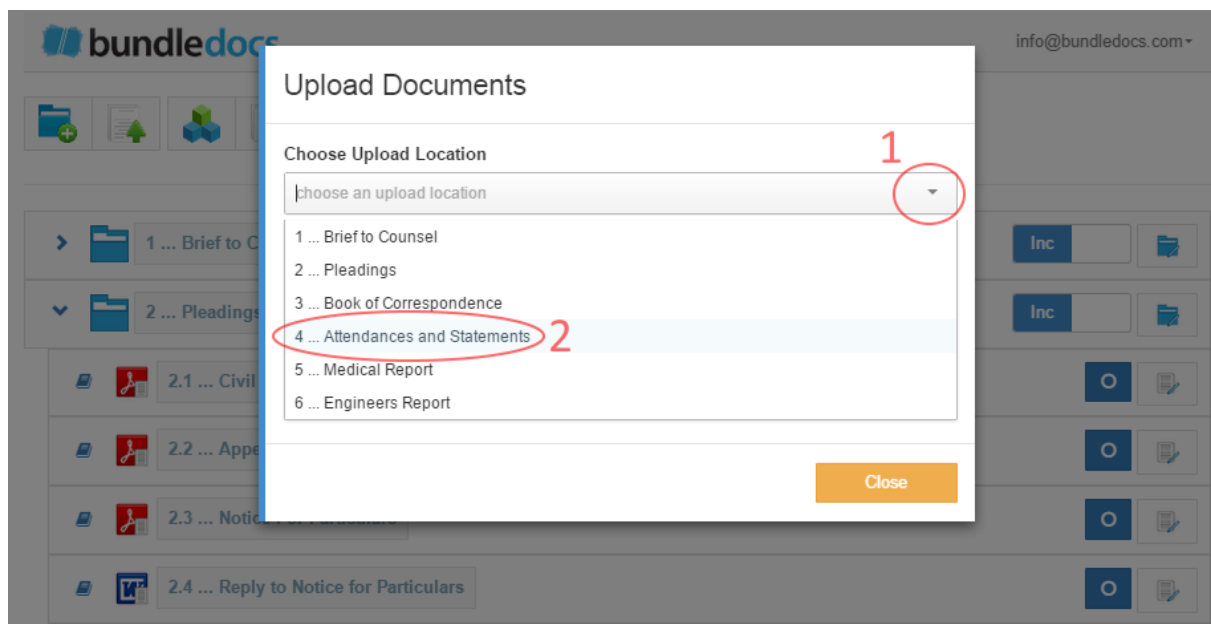
1. Within the 'Edit Bundle Section', select the 'Delete' button. The section will then be deleted.

Upload Documents:

Upload to a specific folder or section

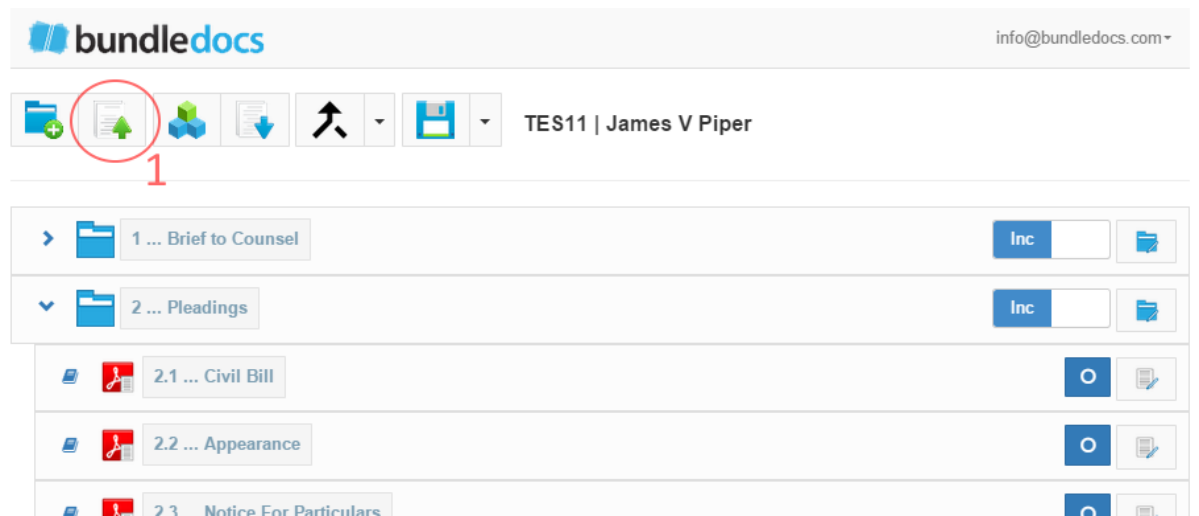


1. Click to upload documents.

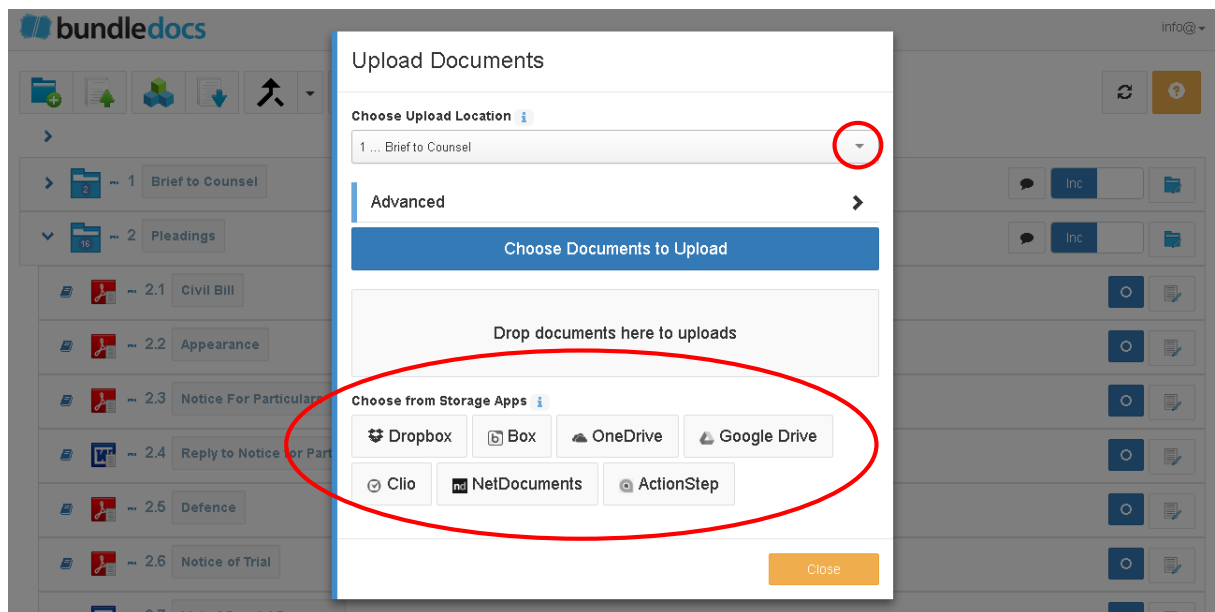


1. Select the dropdown within the 'Choose an upload location' section.
2. Choose from the dropdown where you want to upload your documents. For example, 'Attendances and Statements'.

Upload from Storage Apps – Cloud Based



1. Click to upload documents.

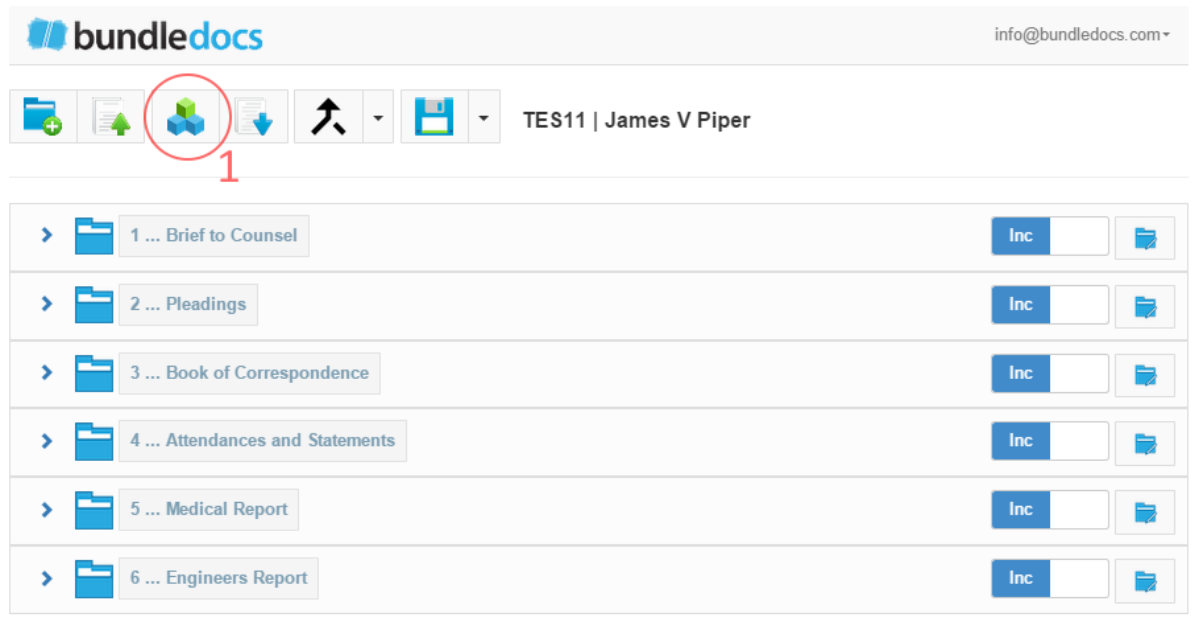


1. Select the dropdown within the 'Choose an upload location' section. Choose from the dropdown where you want to upload your documents. For example, 'Attendances and Statements'.
2. Choose to upload documents from a Storage App including: Dropbox, Box, OneDrive or Google Drive

Note: Bundledocs integrates with a range of solutions. Our 'Storage Apps' are just some of our cloud based integration partners. For information on our other partners including, iManage, Tikit TFB, Worldox etc. please [get in touch with our team today!](#)

Generate Bundle:

In order to produce our bundle it must first be 'generated'.

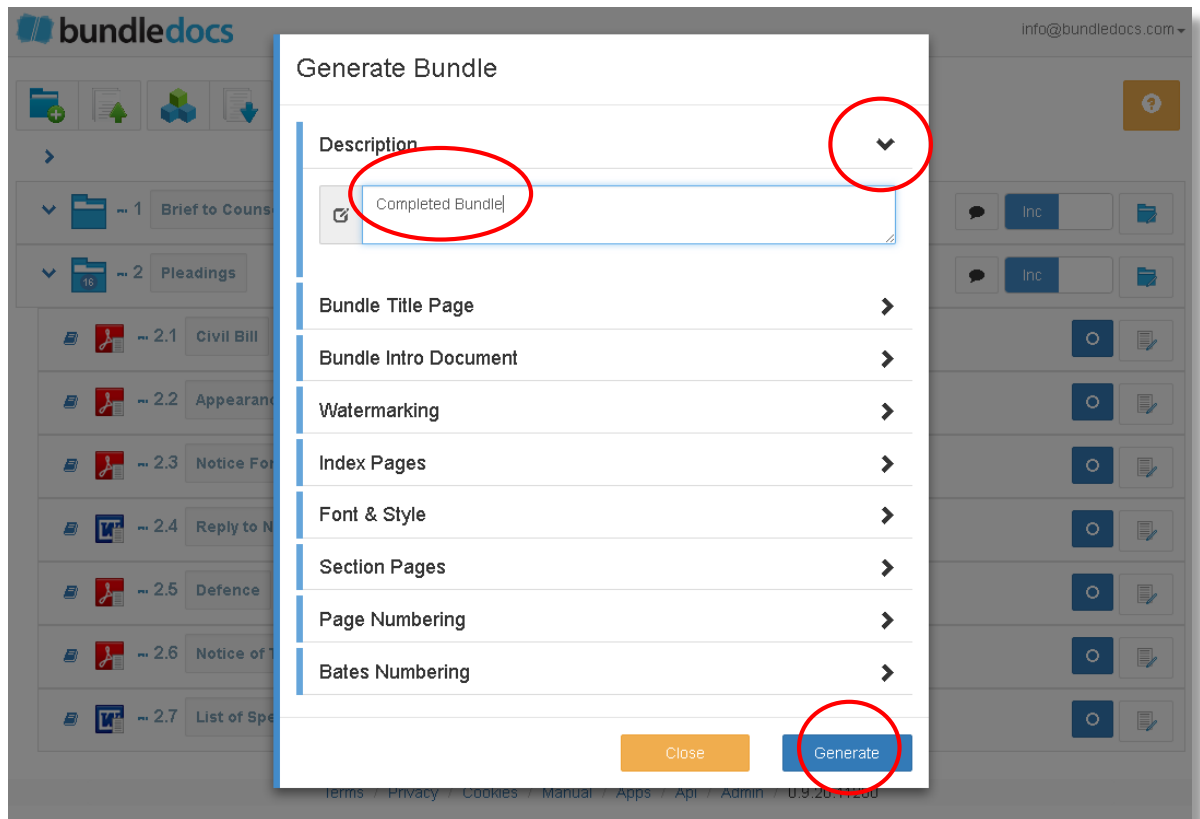


1. Once you are happy with your bundle, click here to generate.

Once the generate button has been selected a window containing additional features will then appear. We will discuss these next. However, if you are happy with your bundle and do not wish to use these features, select the generate button to complete. A preview of your completed bundle will immediately appear on screen and you will be sent an email informing you that your bundle is ready to download.

Description

A description is the title used to describe your bundle. When generating a single section bundle i.e. a bundle with only one section/folder created, the bundle automatically takes the description of the section name. However, if a user creates a multiple section bundle i.e. more than one section/folder within the bundle, then it is important to include a description. In our example we have used the description, “Completed Brief”.

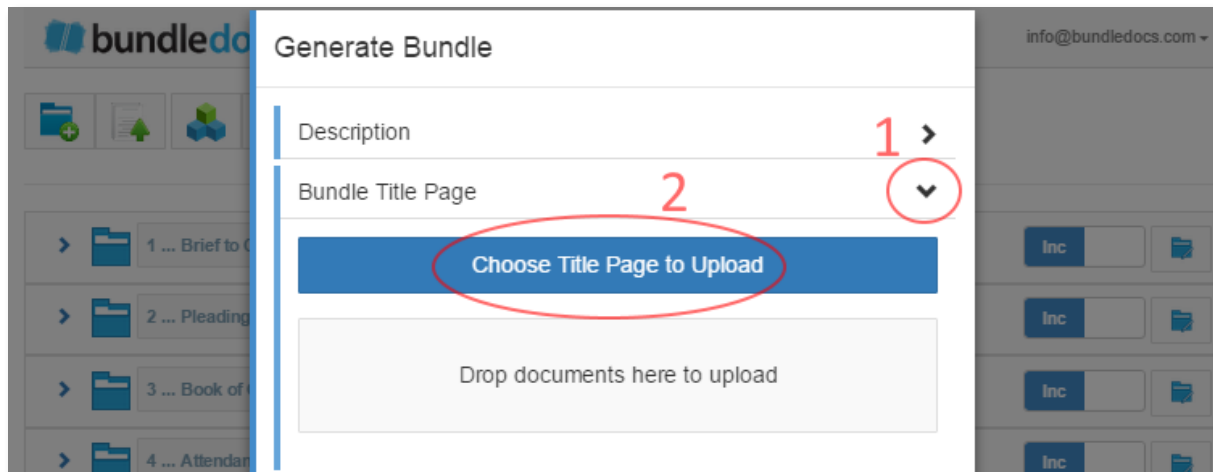


1. Once you click the generate button, the window above will appear. Click the + symbol beside the 'Description' title to reveal the section below.
2. Insert a description within the field provided.
3. Select 'Generate' to complete

Bundle Title Page

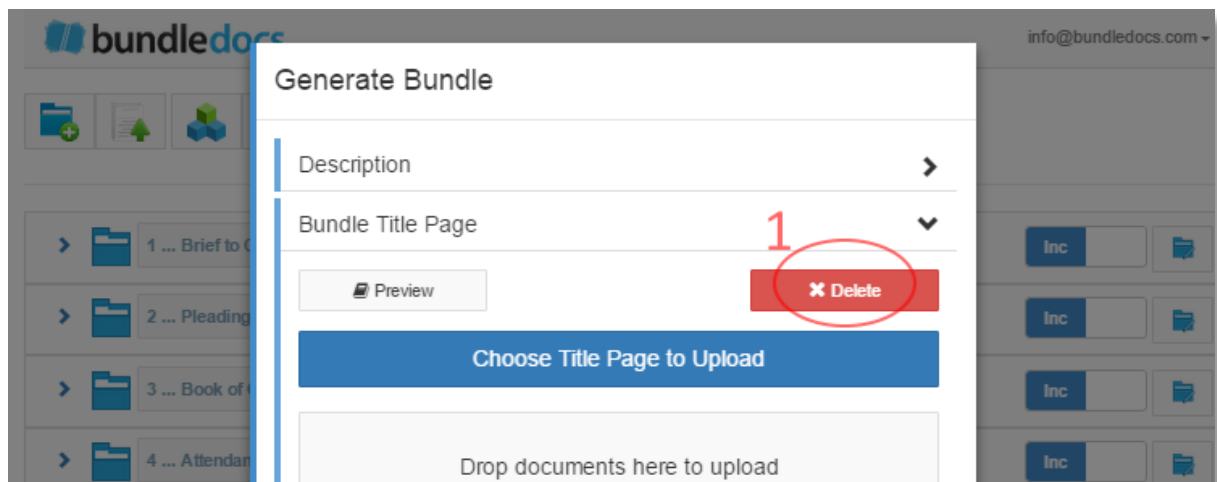
Upload bundle title page:

The 'Upload bundle title page' option enables users to upload a title page or cover page for their bundle. This is particularly useful for users forwarding bundles to third parties.



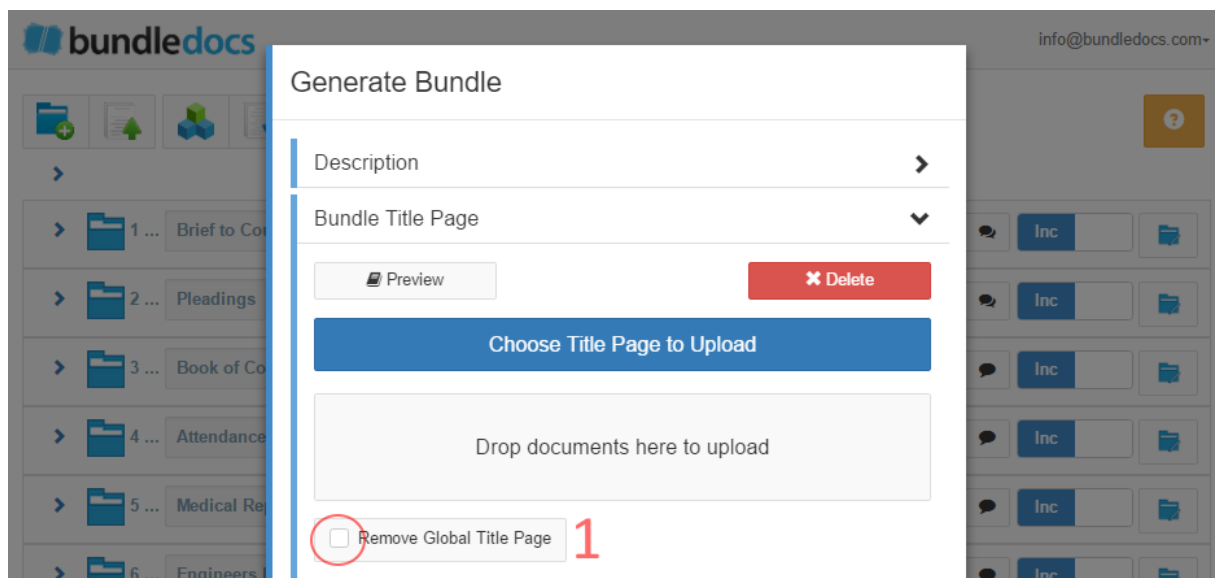
1. Within the 'Bundle Title Page' section, select the 'Choose Title Page to Upload' button. A File Upload window will appear and users should select and upload their title page.

Delete bundle title page:



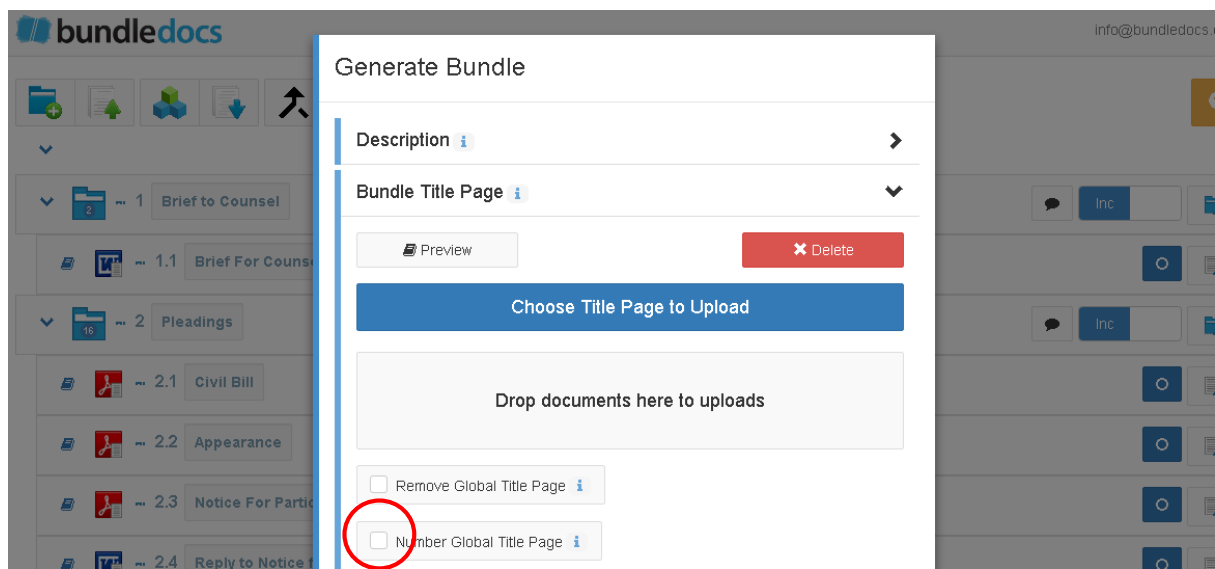
1. Select the 'Delete' button to remove the current title page from your bundle.

Remove Global Title Page:



1. Remove Global Title Page: This will remove the global index page from the beginning of your bundle.

Number Global Title Page:

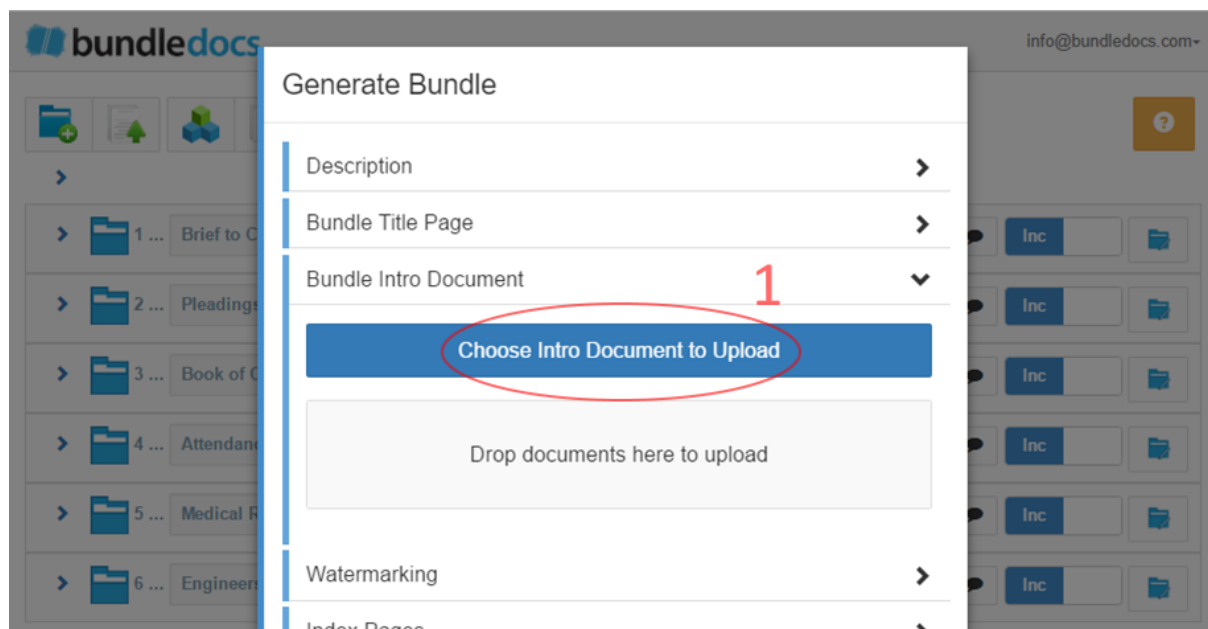


1. Number Global Title Page: This include the global title page - the title page that appears at the beginning of your bundle – in the numbering sequence.

Bundle Intro Document

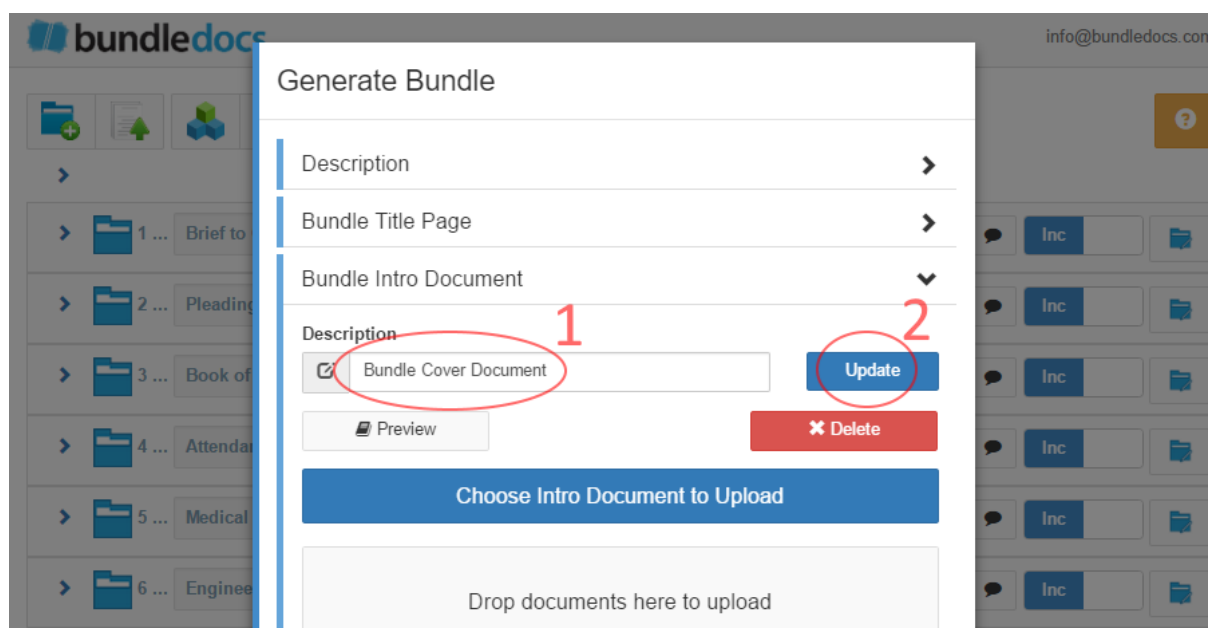
Upload Intro Document:

Using the Bundle Intro Document option enables you to upload a document into your bundle that will appear after the first index and before the first document within your bundle. This is great if you need to upload a 'Table of Authorities' for your bundle.



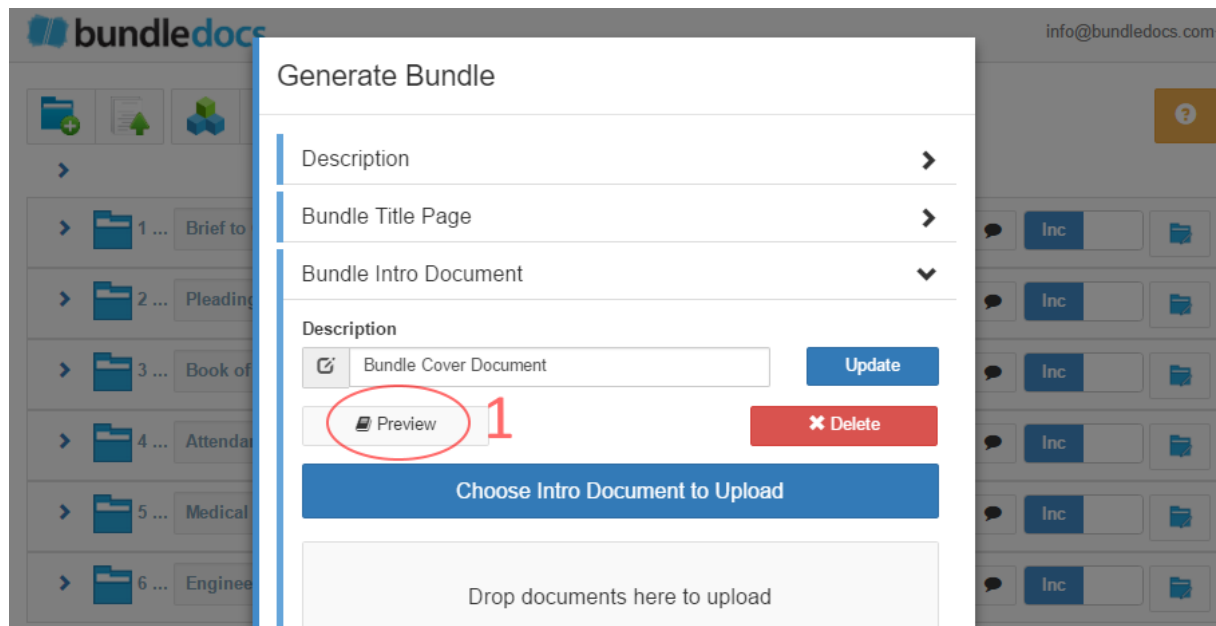
1. Within the 'Bundle Intro Document' section, select the 'Choose Intro Document to Upload' button. A File Upload window will appear and users should select and upload their title page.

Re-Name Intro Document:



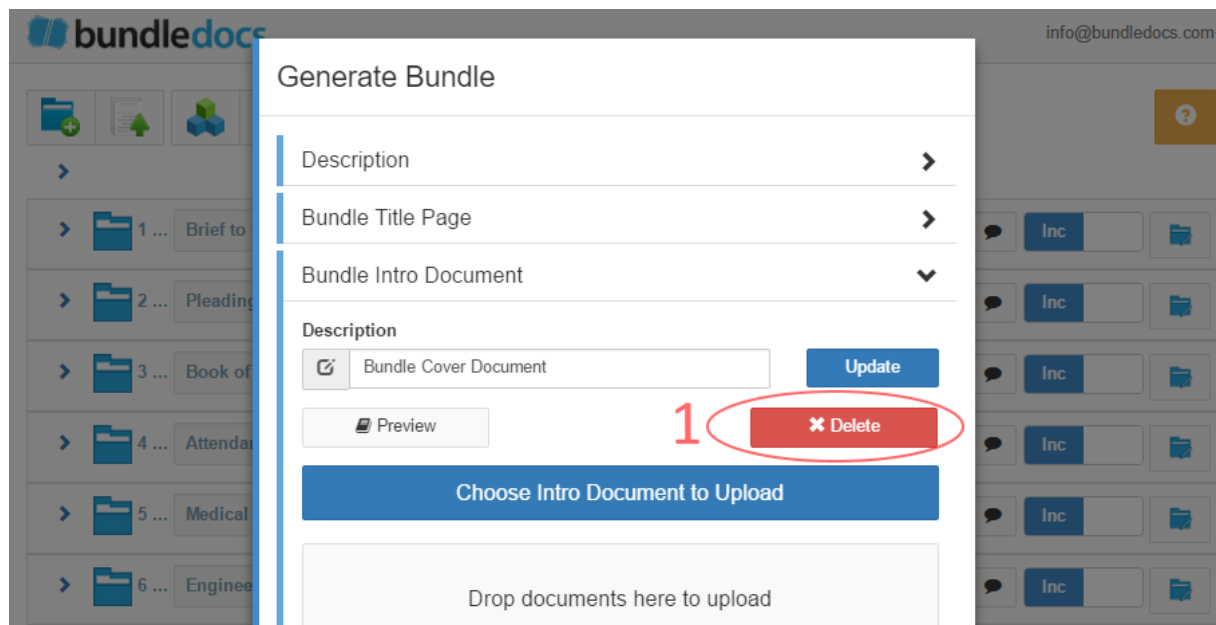
1. Provide a name for your uploaded document, this will appear in your index.
2. Select 'Update' to save changes.

Preview Intro Document:



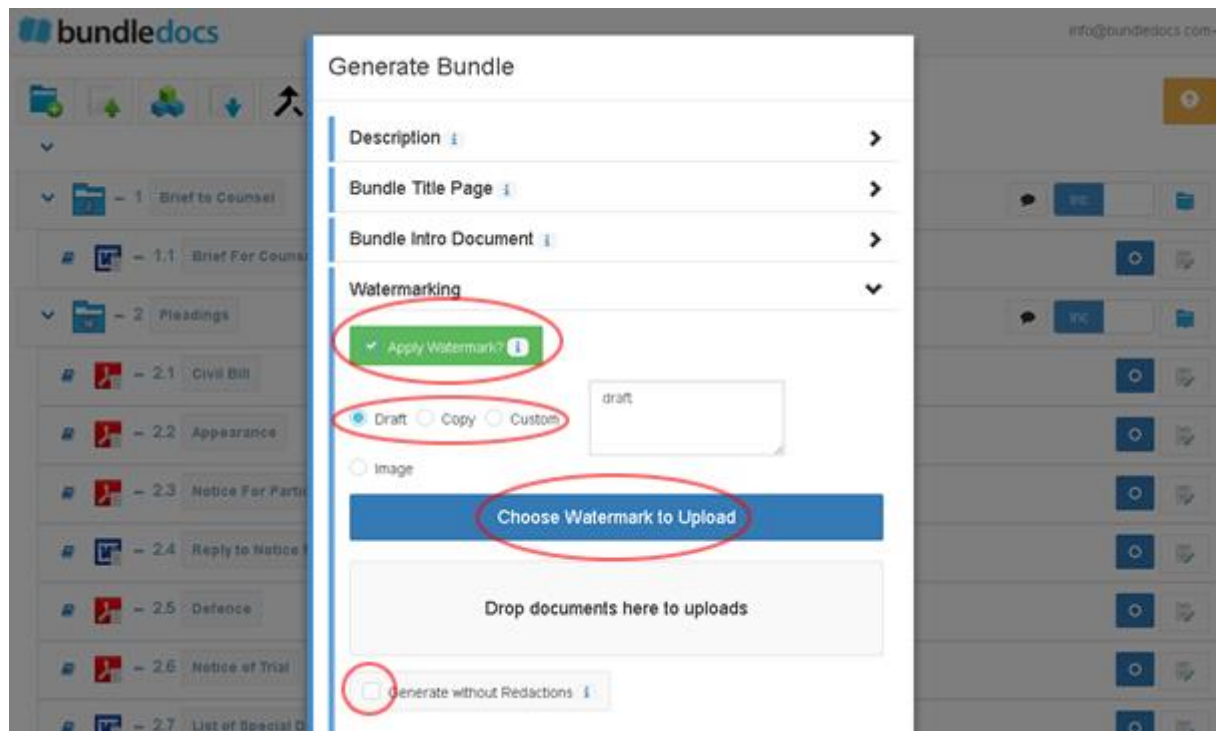
1. Select 'Preview' to quickly preview your uploaded Intro Document at any time.

Delete Intro Document:



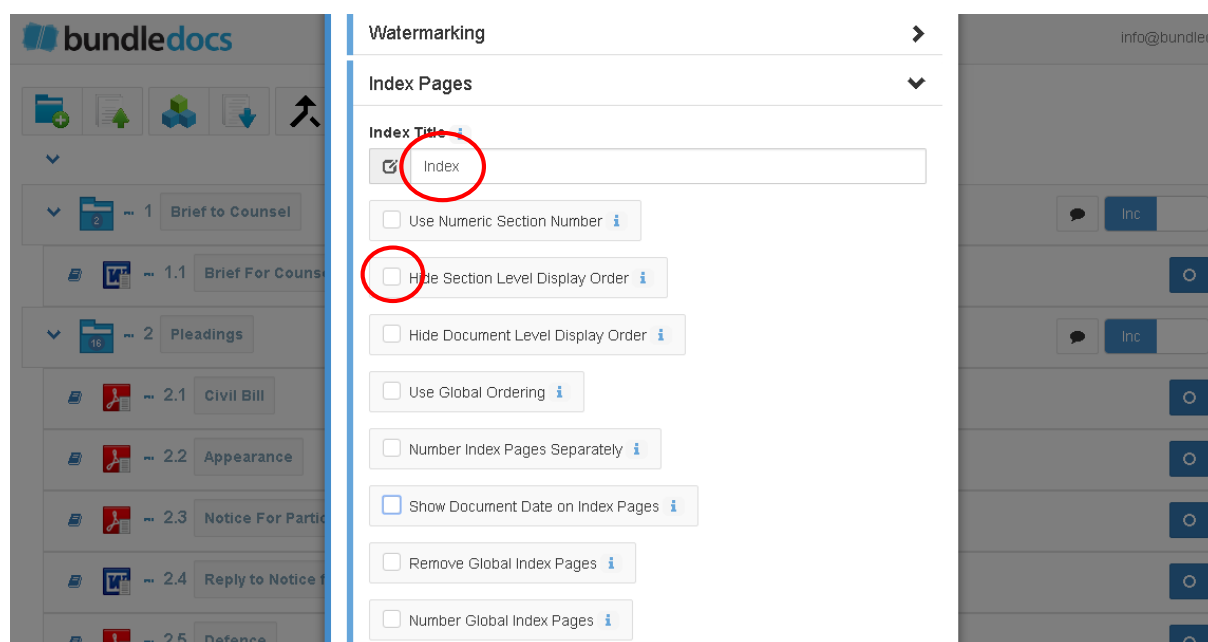
1. Select 'Delete' to delete your uploaded Intro Document. Once deleted you can easily choose another Intro Document to upload.

Watermarking



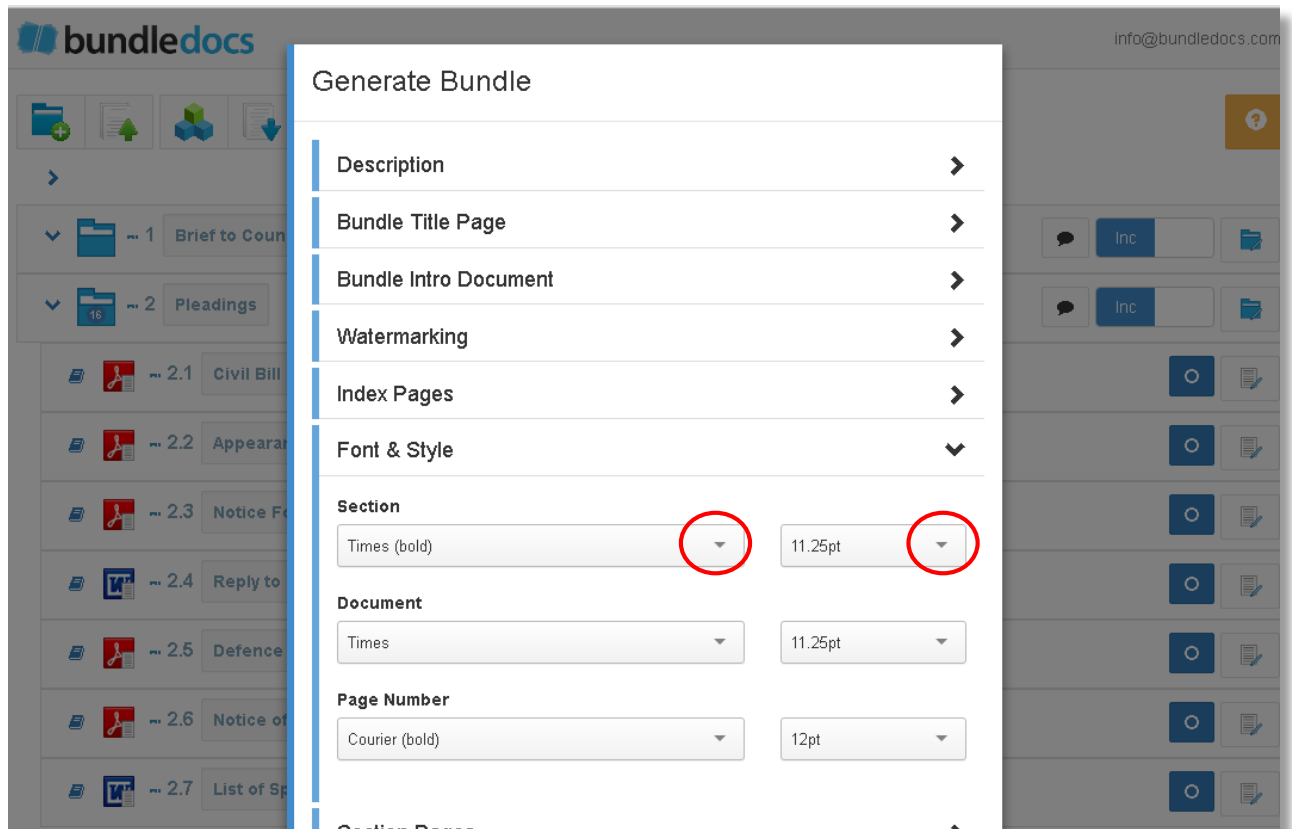
1. Apply Watermark?: Select to apply a watermark to your bundle
2. Choose to apply a Draft, Copy or Custom watermark when generating.
3. Alternatively, select 'image' and choose to upload an image as your watermark.
4. Generate without Redactions: If you have applied redactions to your documents within Bundledocs you can select this option if you would like to produce your bundle without redactions i.e. not included.

Index Pages



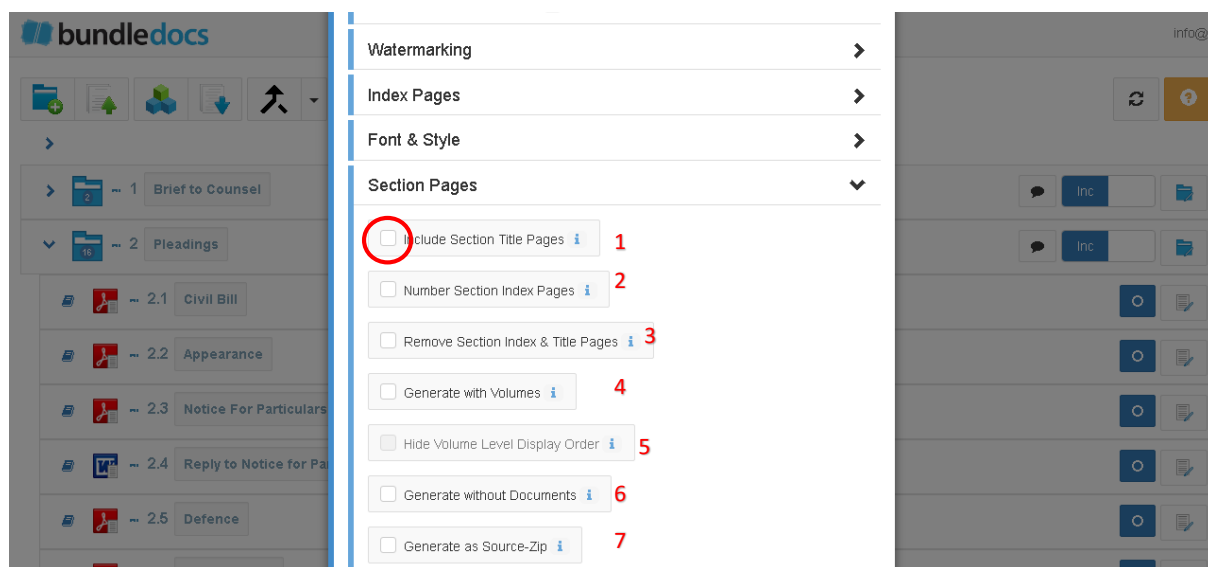
1. **Index:** Change the text that appears as title for your 'Index' page. For example, use "Table of Contents" rather than "Index".
2. **Use Numeric Section Number:** Change sections so they are listed numerically. This will change the section numbering so that it will appear Section 1, 2, 3 rather than A, B, C (the default numbering).
3. **Hide Section Level Display Order:** Within your index, you can choose to hide the section level display order, located on the left side of your index page.
4. **Hide Document Level Display Order:** Within your index, you can choose to hide the document level display order, located on the left side of your index page.
5. **Use Global Ordering:** Numbering will remain sequential regardless of whether sub-sections are used.
6. **Number Index Pages Separately:** Will apply alternative numbering to index pages. Numbering will appear in the format: i, ii, iii etc.
7. **Show Document Date on Index Page:** If you have chosen to include the document date within your bundle, select this option to include the date within your completed index.
8. **Remove Global Index Pages:** This will remove the index page that appears at the beginning of your bundle.
9. **Number Global Index Pages:** This include the global index page - the index page that appears at the beginning of your bundle – in the numbering sequence.

Font & Style:



1. **Section:** Choose a font and font size for the section headings.
2. **Document:** Choose a font and font size for the document names.
3. **Page Number:** Choose a font and font size for the page numbers that appear on your bundle.
For example, the numbering that appears at the bottom right of each page of your bundle.

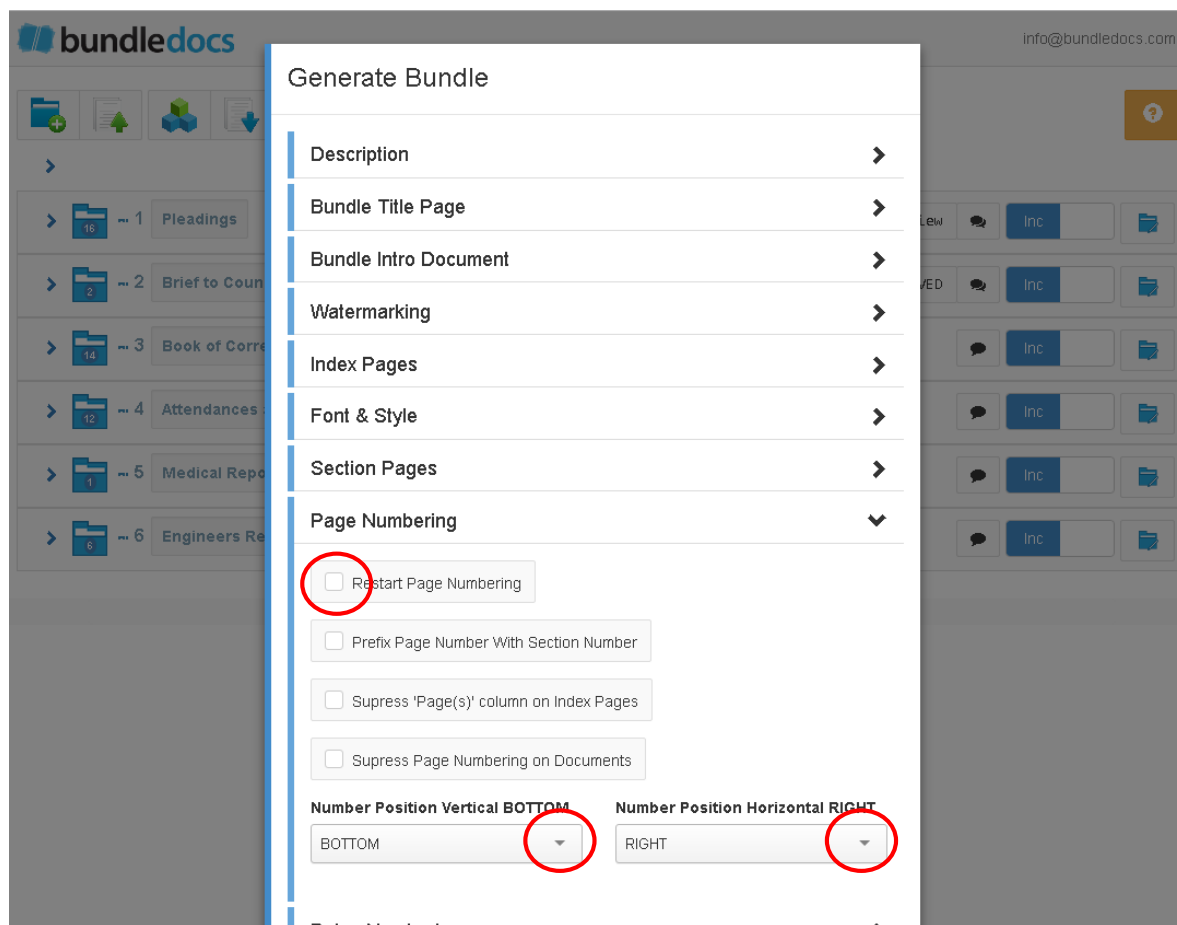
Section Pages:



- 1. Include Section Title Pages:** When generating a bundle users have the option to include section title pages within their bundle. By selecting 'Include Section Title Pages', a title page will be inserted before each new section in your completed bundle.
Please note: To upload title pages for sections of your bundle, this can be done through the 'Edit Section Details' button. This is located to the right of each section of your bundle.
- 2. Number Section Index Pages:** By default, if you create multiple sections for your bundle, Bundledocs will automatically generate individual section index pages. Select this option if you wish to include these pages within your index and page numbering scheme.
- 3. Remove Section Index & Title Pages:** For those that have created multiple sections, Bundledocs automatically generates index pages for every section of your bundle. Select 'Remove Section Index and Title Pages' if you wish to remove these index pages and any section title pages.
- 4. Generate with Volumes:** Select 'Generate with Volumes' to generate a bundle with volumes. Please see our 'Working with Volumes' section for more information.
- 5. Hide Volume Level Display Order:** Select this option to hide the volume level display order from your completed index. This will removed the numbering that normally appears to the left of your volumes/sections. For example: "1. Brief to Counsel" will now appear as "Brief to Counsel".
- 6. Generate without Documents:** Select this option to generate a bundle without any uploaded/included document.
- 7. Generate as a Source-Zip:**

Top Tip: Select the options 'Remove Section Index & Title Pages' and the 'Generate without Documents' option to simply generate the index for your bundle. Once generated, this can be securely shared with outside counsel – or any third party.

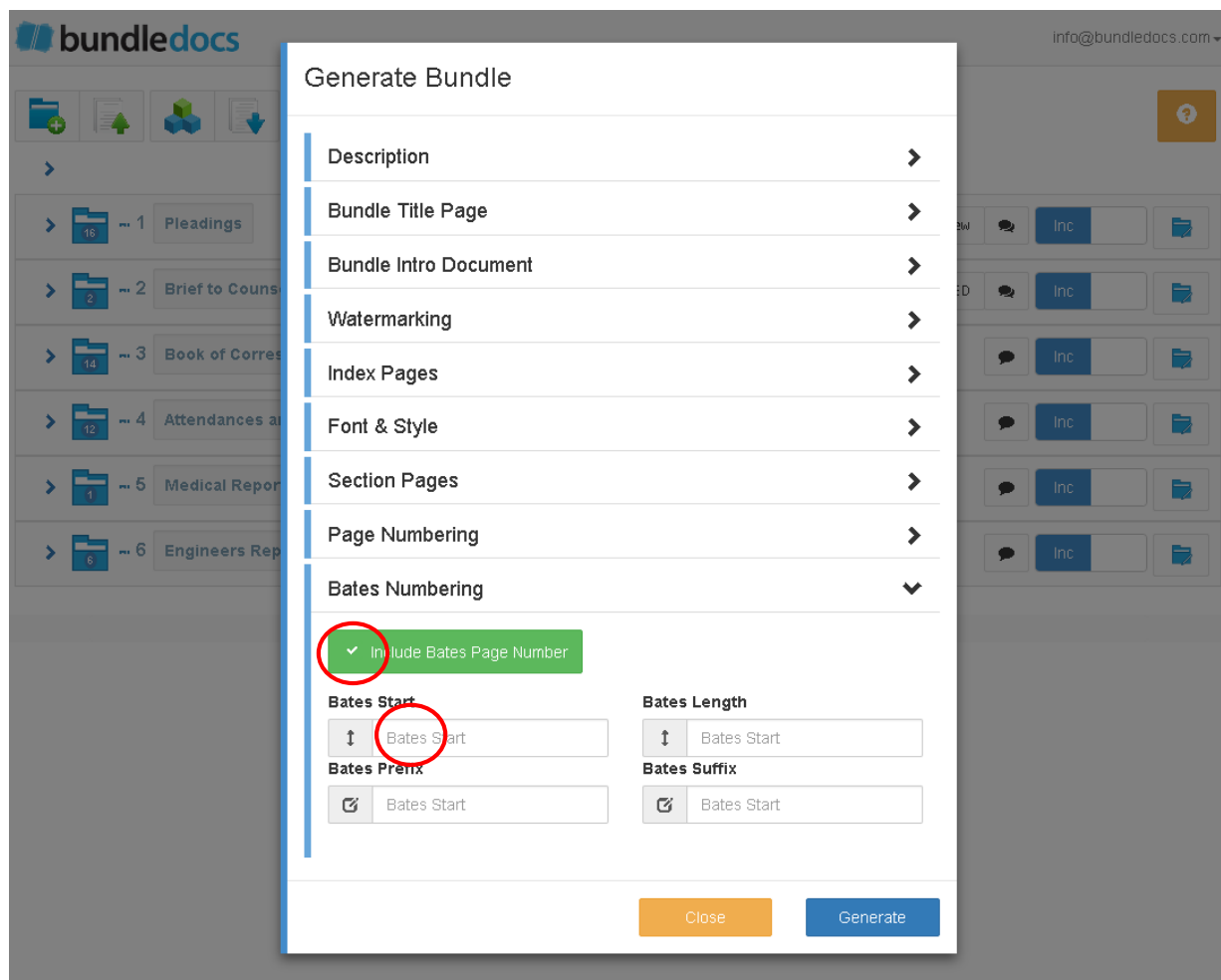
Page Numbering



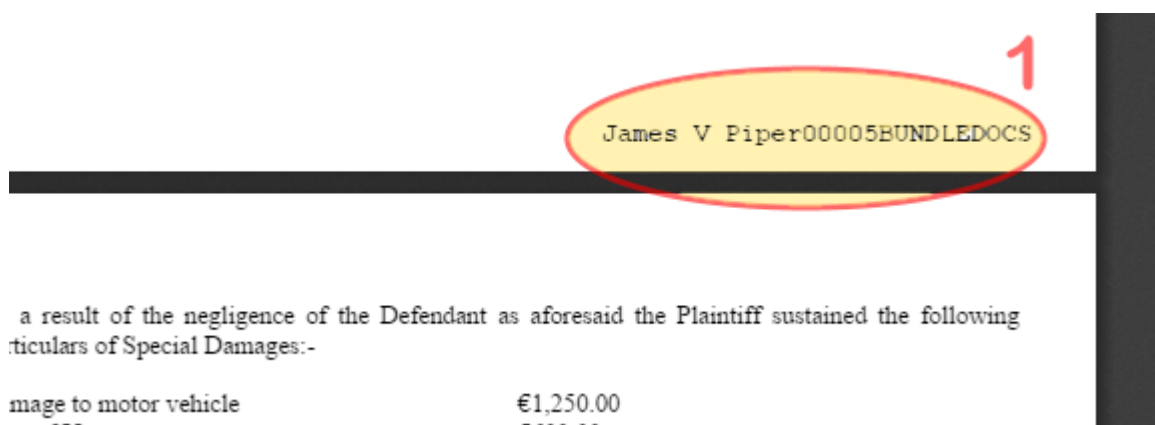
1. **Restart Page Numbering:** Select if you wish to restart the numbering at the beginning of each section.
2. **Prefix Page Number with Section Number:** Choose to include both the section number and page number within your numbering scheme. For example: A.1, A.2, A.3
3. **Surpress 'Page(s)' column on Index Pages:** Select this option to hide the page numbering column (that appears on the right) from both your index and section index pages.
4. **Surpress Page Numbering on Documents:** Select this option to hide page numbering from all pages of your bundle.
5. **Number Position Vertical Bottom:** Choose from the dropdown menu where you wish to place your numbering on the page – Bottom or Top.
6. **Number Position Horizontal Right:** Choose from the dropdown menu where you wish to place your numbering on the page – Left, Centre or Right.

Bates Numbering

Bates numbering is a method of indexing legal documents for easy navigation and retrieval. With Bundledocs, users can specify how they want their numbering to appear. For example, users set the number starting point, the length of the page number, the bates prefix and the bates suffix. See the images below.



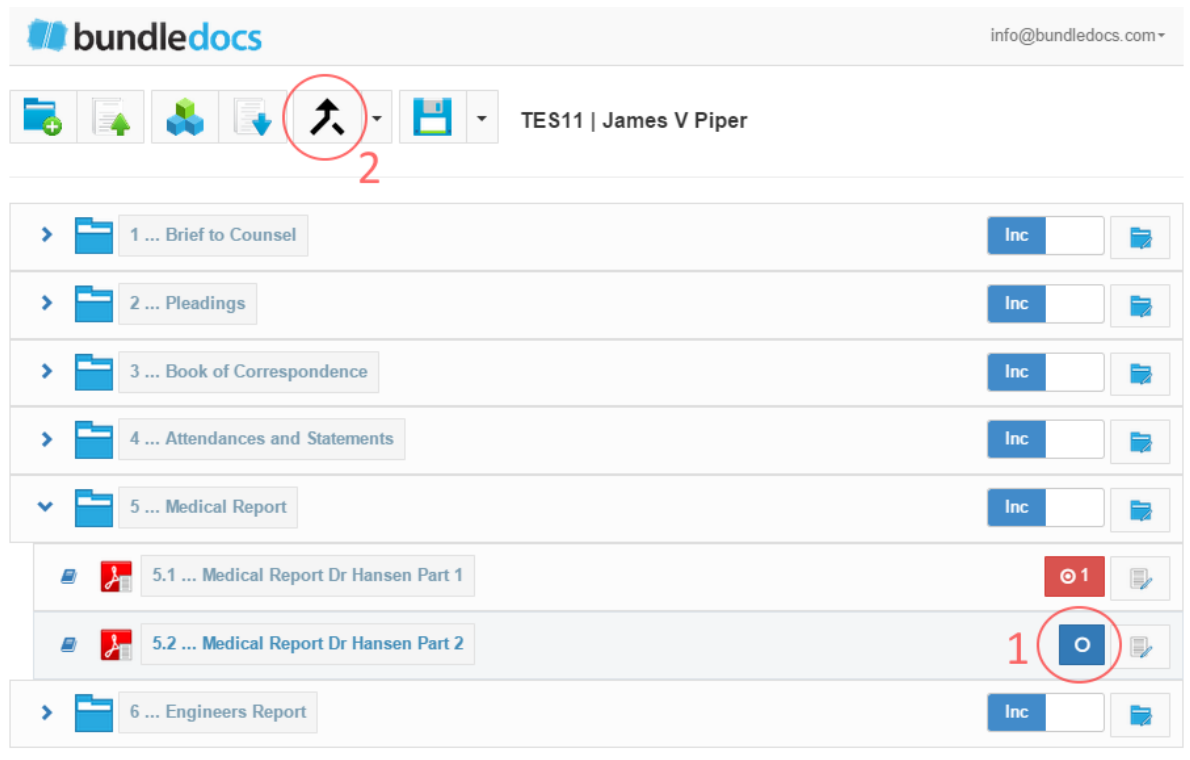
1. Select if you wish to include bates numbering within your bundle.
2. Fill in the fields provided and select 'Generate'.



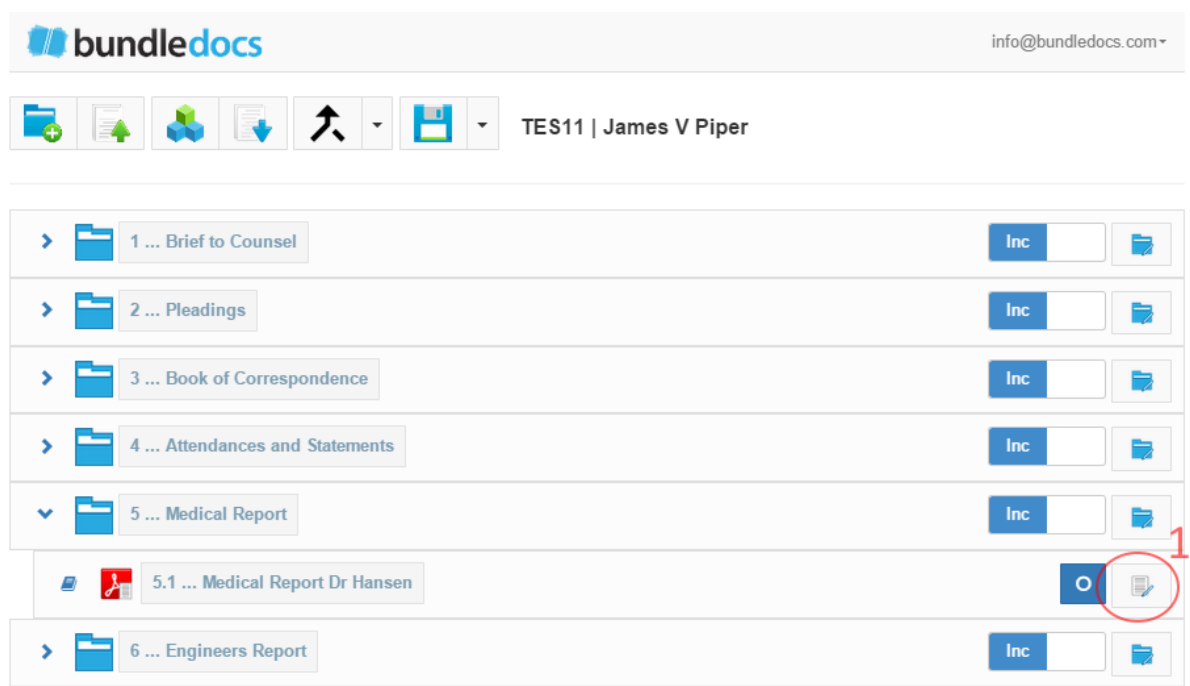
1. Bates numbering as it appears in a PDF bundle.

Merging Files:

Merge Documents:



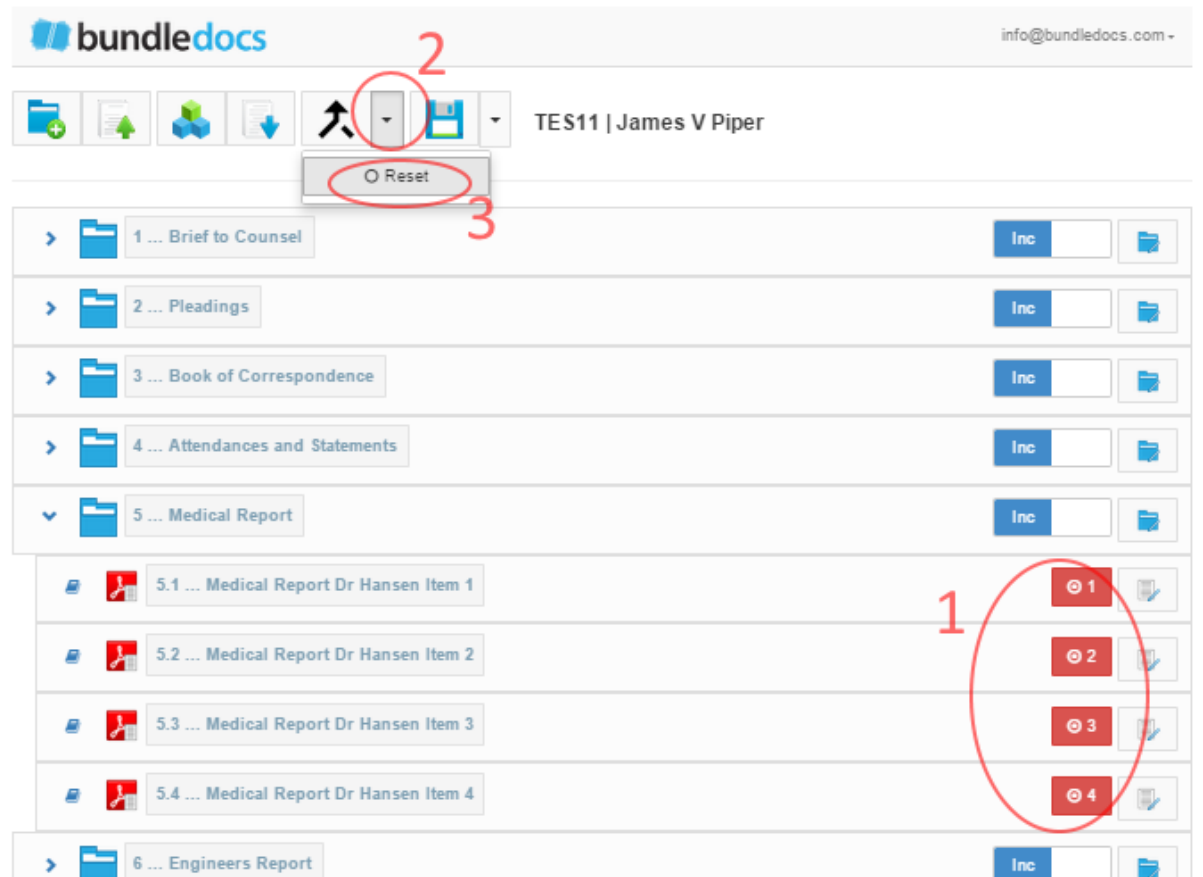
1. Select the files you want to merge. Once a file is selected the icon will appear in red.
2. Select the 'Merge' button.



1. The documents have now been successfully merged. By default the new merged documents will take the name of the first document in the merge sequence. This file can be easily re-named. Simply press 'save' to update the order of your documents.

Clear Merge Selections

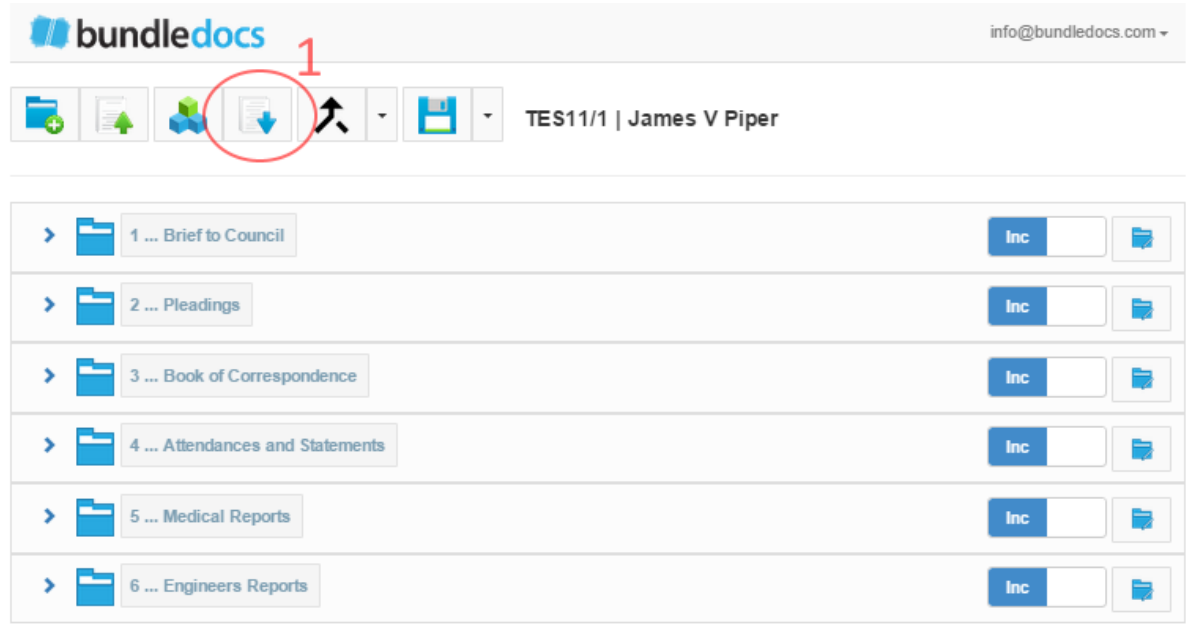
When merging documents within Bundedocs, firstly you will need to select any documents you wish to merge. In some cases, you may have a number of documents selected and then may decide that you no longer want to merge these files. To clear any selections made, simply do the following:



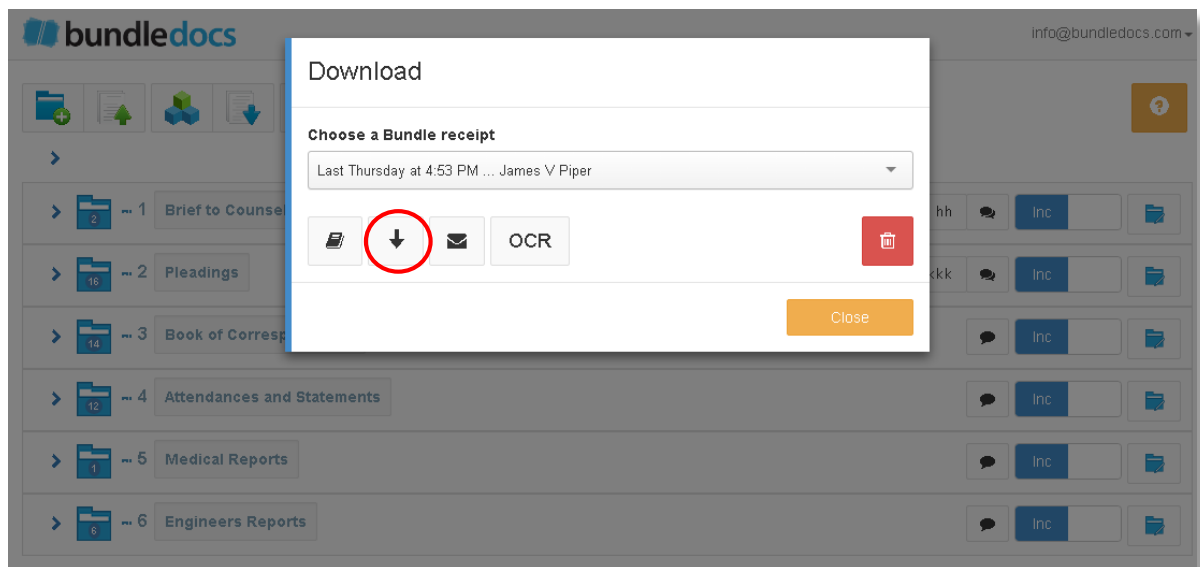
1. All selected files are marked in red, as shown above.
2. To clear all selections made, select the arrow next to the 'Merge' option.
3. From the dropdown, select 'Reset'. This will automatically clear all selections made.

Download Bundle:

Once your bundle has been generated it is ready to download. *Bundledocs* automatically emails the completed bundle to you, however, users can also access their bundle within their account by selecting the 'Download' button. All bundles can be downloaded at any time and as many times as you need.



1. Click here to download your completed bundle.

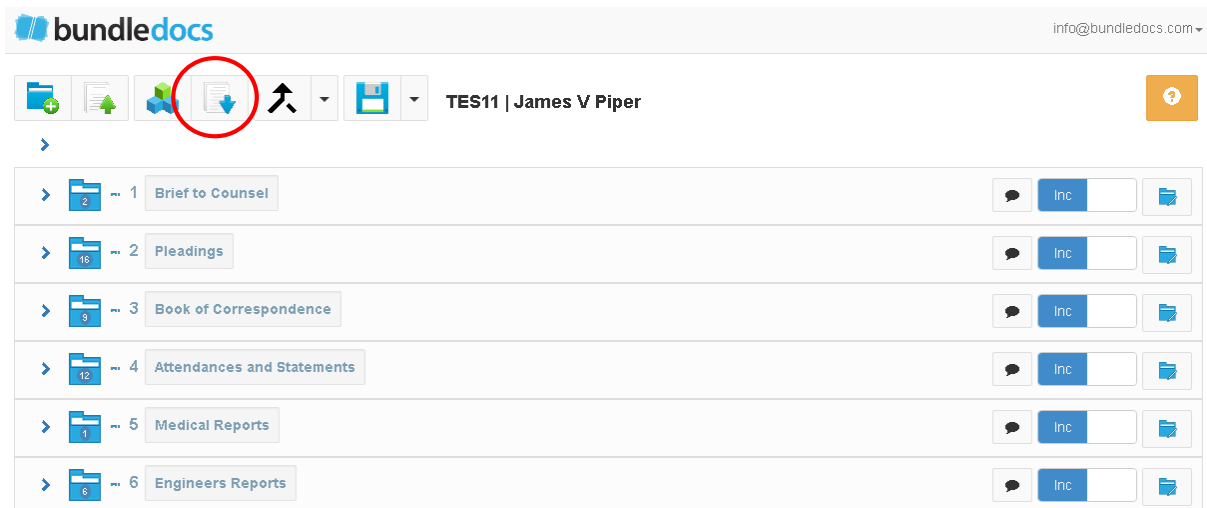


1. The download button allows you to access a copy of the last five bundles you generated for this case. Select the bundle you want to download from the dropdown.
2. Select 'Download'

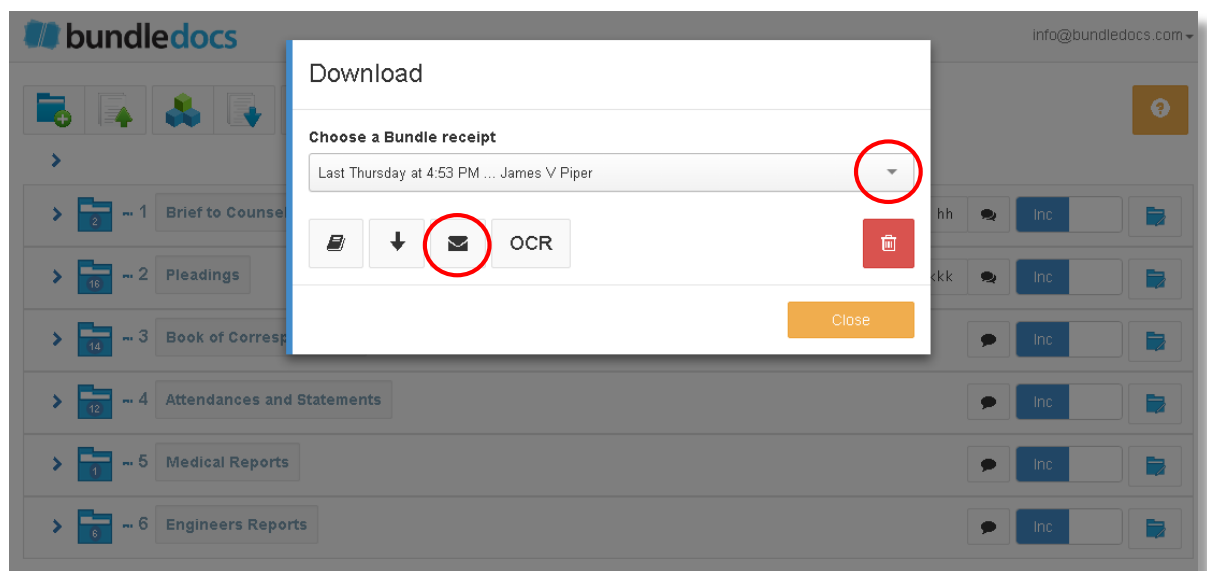
Collaborate with Others:

Securely Send (Forward bundle to 3rd party)

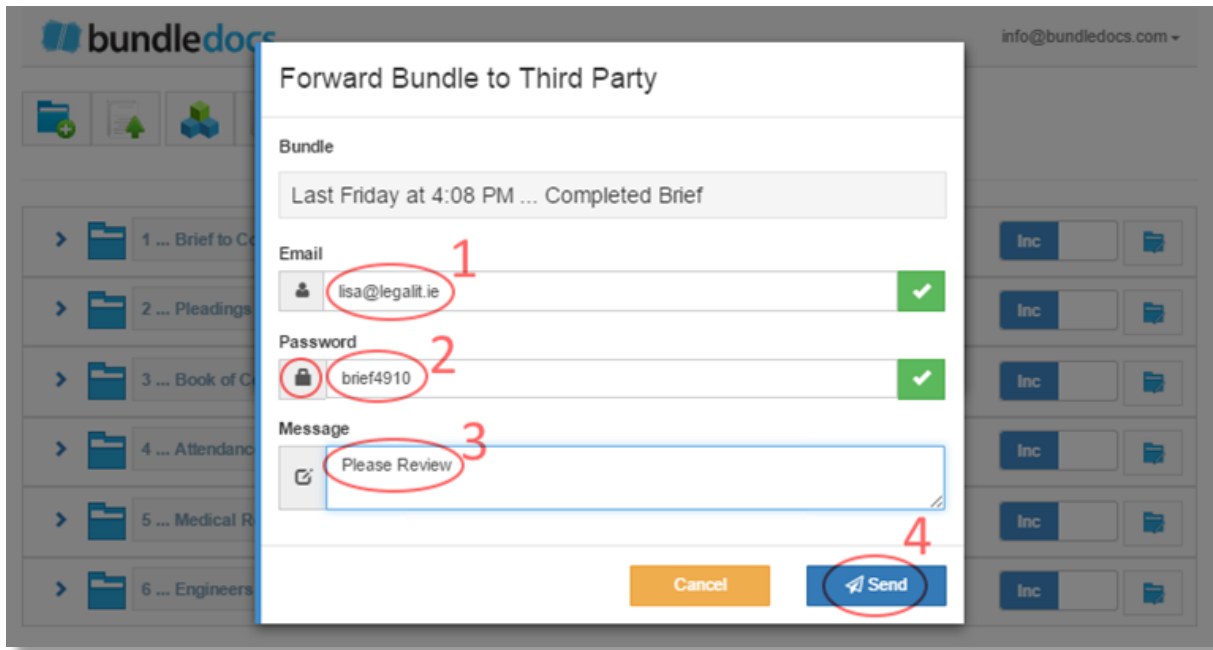
Bundledocs allows users to forward a security protected bundle to third parties. This is particularly useful for users generating large bundles, which may be too large to send via email. Furthermore, any bundle can be sent to third parties, regardless of their location.



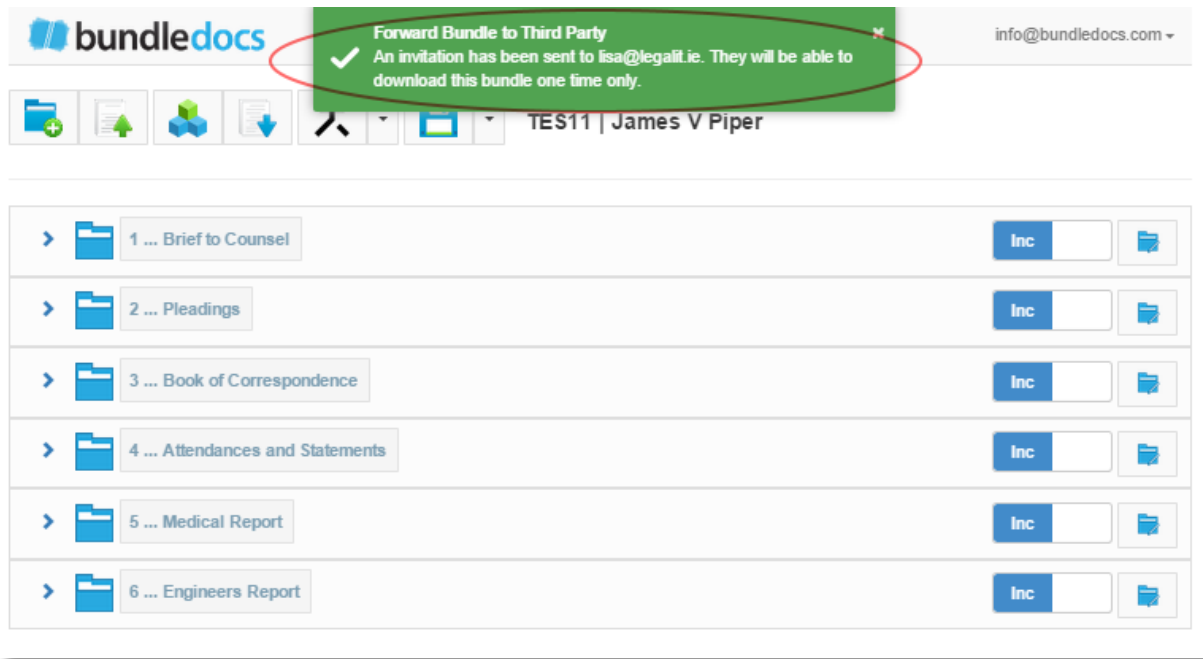
1. Click on the 'Download' button.



1. Select from the dropdown which bundle you want to forward
2. Select 'Forward'



1. Insert the email address of the recipient you want to download this bundle.
2. Provide a password to ensure only the intended recipient can download this bundle.
Don't want to type a password? Simply select the lock icon, as highlighted above, to automatically generate a password.
3. Write a message to the recipient, if you wish.
4. Press 'Send'.



1. Once an invitation has been sent a window will appear on screen (as shown above).



info@bundledocs.com has
invited you to download a
completed document bundle!

Password: brief4910

1

Use the link in the previous email and the password in this one to
download this bundle.

1. The recipient will be sent an email containing the password needed to view the bundle.

info@bundledocs.com has
invited you to download a
completed document bundle!

Please Review

You will receive a second email shortly containing a password that you
can use to download this bundle.

You may download this bundle one time only.

Clicking download below will take you to a download page where you
can enter a bundle password.

Download

1

1. The recipient will then be sent an email with a 'Download' button.

The screenshot shows the 'bundledocs' website header with links for 'Create an account', 'Bundledocs Website', 'Preview Bundle', and 'Login'. Below the header, a section titled 'Enter bundle password to download a bundle' contains a 'Bundle Password:' label, a text input field with the password 'brief4910', and a 'Download' button. Red annotations include a circle around the password field with a red '1' and a circle around the 'Download' button with a red '2'.

1. To download the bundle, the recipient will need to provide the password. This password was emailed to the recipient previously (ie. brief4910).
2. Select to 'Download' the bundle.

The screenshot shows the 'bundledocs' website header with links for 'Create an account', 'Bundledocs Website', 'Preview Bundle', and 'Login'. Below the header, a section titled 'Enter bundle password to download a bundle' contains a 'Bundle Password:' label, a text input field with the placeholder 'Bundle Invitation Password', and a 'Download' button. Below this, a section titled 'Click the bundle description below to download' contains a list item 'James V Piper' which is circled in red with a red '1' next to it.

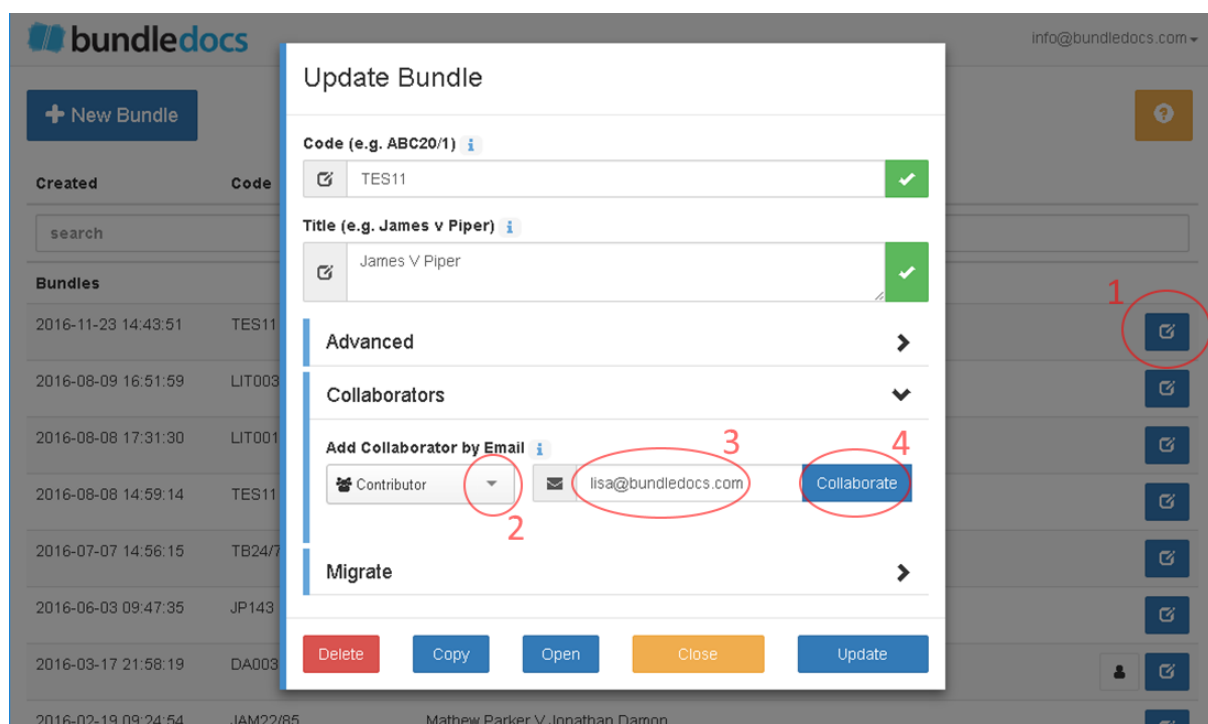
1. If the password is correct, the recipient will click on the case title to download the bundle. For example 'James V Piper'

Collaboration

Collaboration is designed to allow you to effortlessly work with colleagues and/or external third parties such as outside counsel. Unlike Groups, Collaboration allows you to choose individual bundles you would like to collaborate on. With a number of access types you can choose what access you would like to give each collaborator.

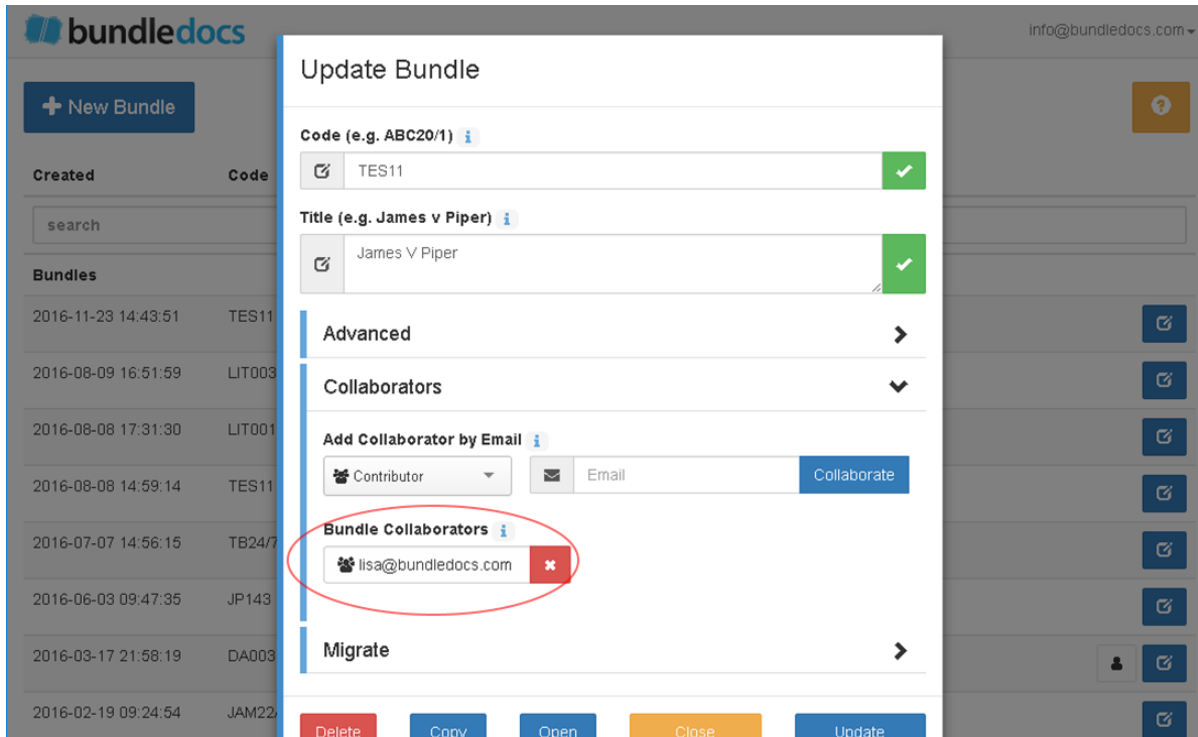
	DOWNLOAD	UPLOAD	UPDATE	GENERATE	MIGRATE	DELETE
Downloader	✓	X	X	X	X	X
Contributor	✓	✓	✓	✓	X	X
Owner	✓	✓	✓	✓	✓	✓

Add a Collaborator

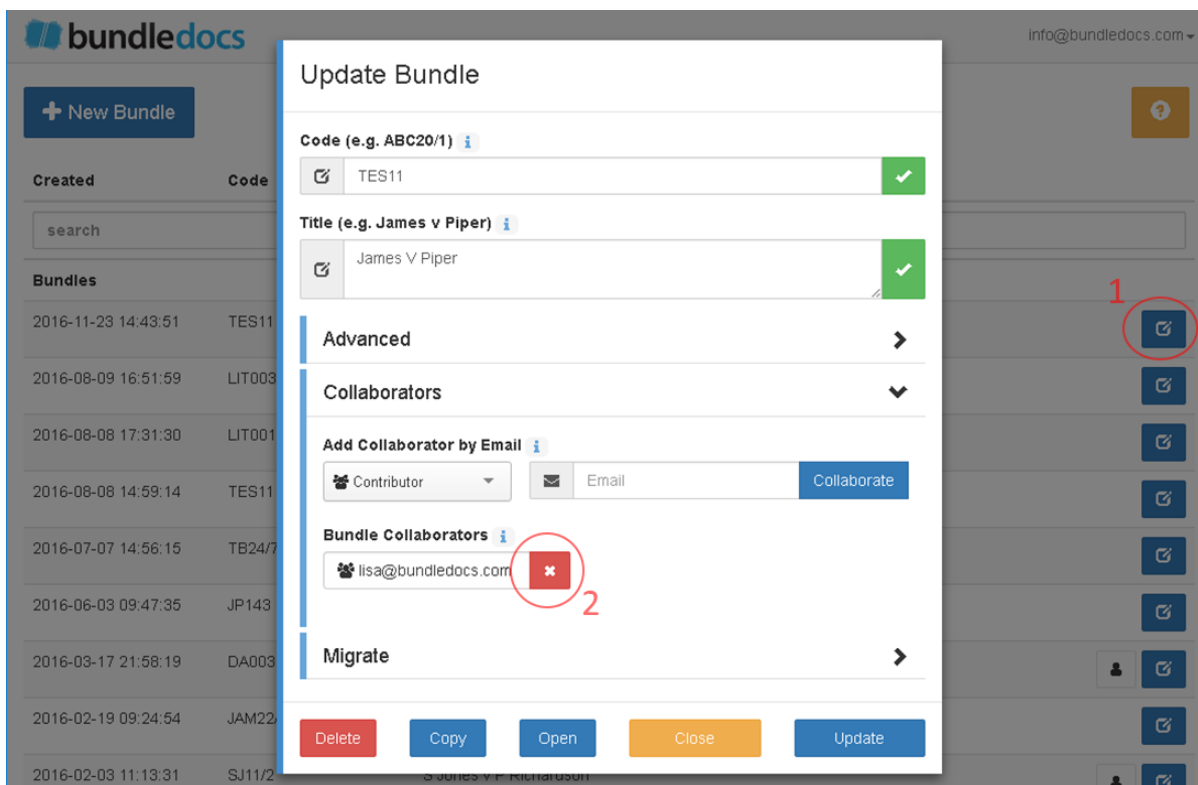


1. Select the 'Edit Details' icon to the right of your case
2. Within the 'Collaborators' section, choose the collaborator type from the dropdown (for example: Downloader, Contributor or Owner).
3. Type the email address of the recipient in the field provided
4. Click 'Collaborate' to send the invitation to collaborate to this recipient.

Any Case Collaborators that have been invited to collaborate on this case will be listed within the 'Collaborators' section.

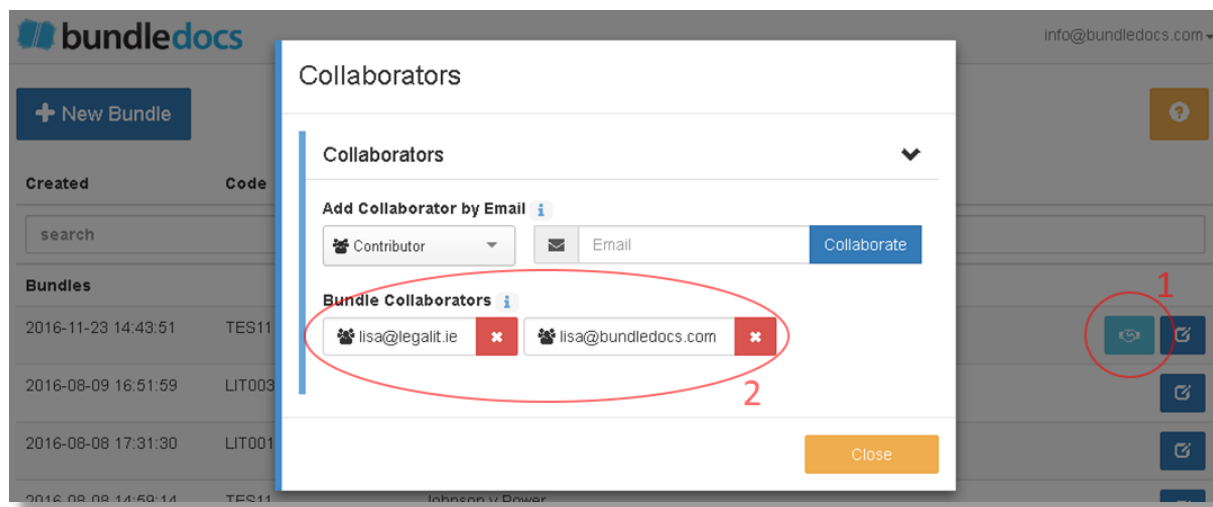


Revoke Collaborator Access



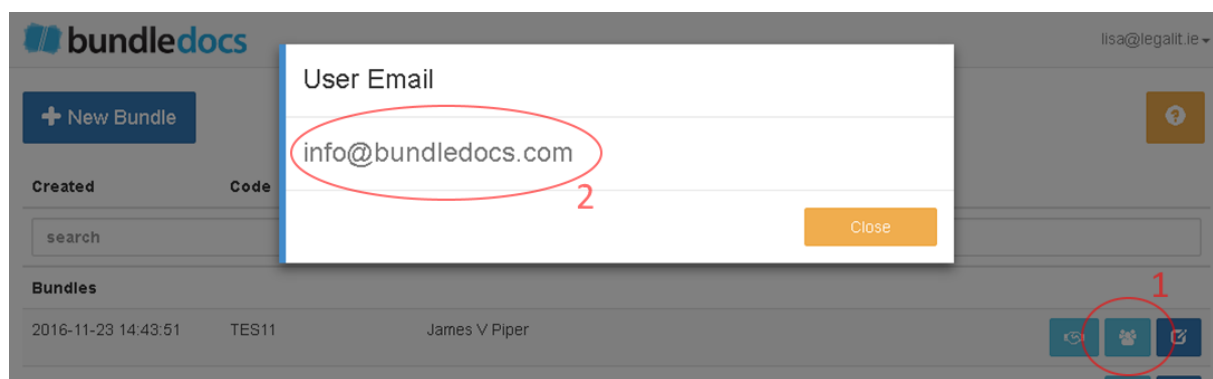
1. Select the 'Edit Detail' icon, this is located to the right of your bundle.
2. A window will appear. Within the 'Collaborators' area any individuals that have been invited to collaborate on a bundle will be listed. Simply select the Red X to remove any user.

Reveal Collaborators of a Bundle



1. Select the 'Collaborators' icon – to the right of your bundle - to reveal the current collaborators for each bundle.
2. A window will then appear. All bundle collaborators will be listed.

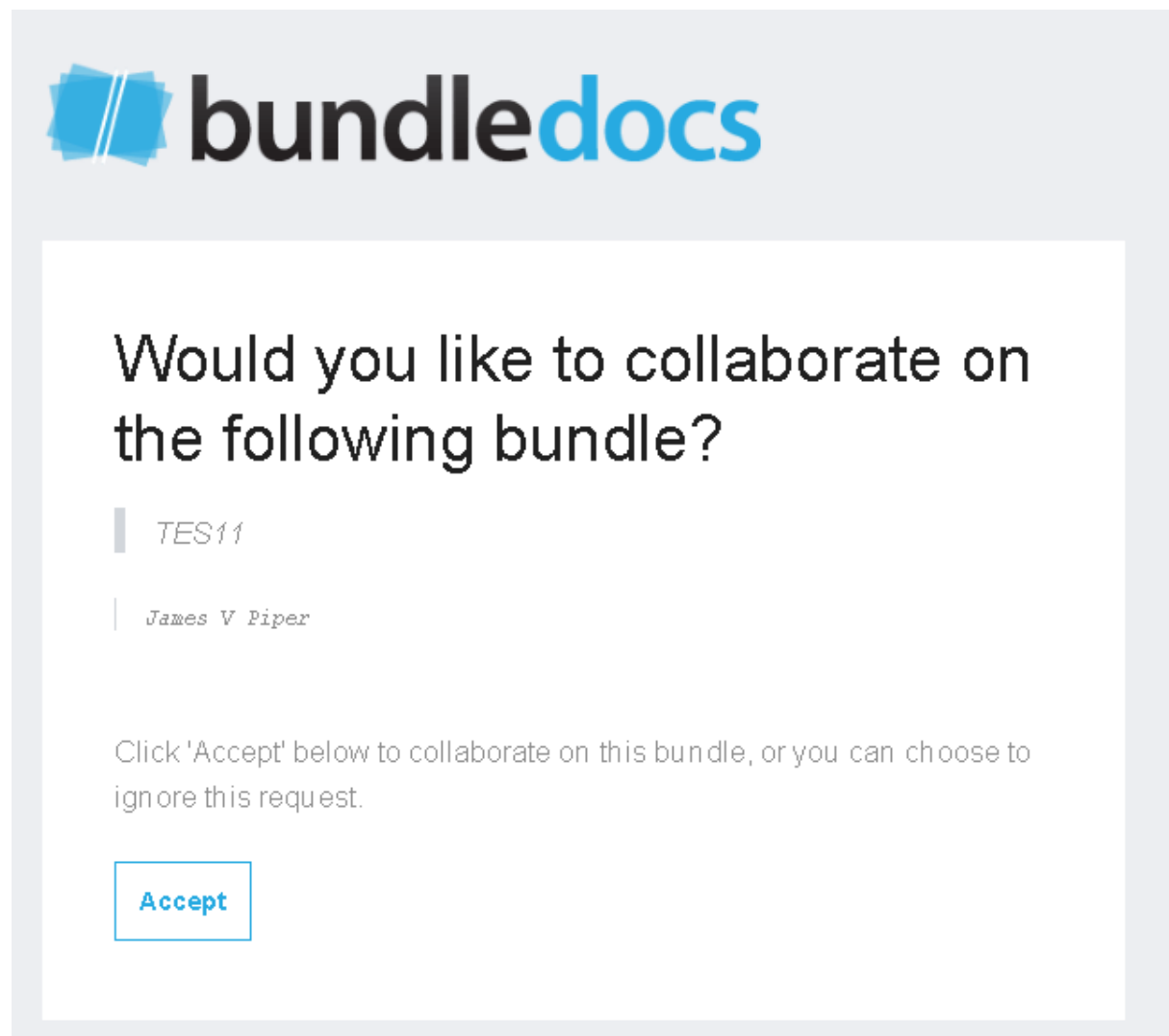
Reveal Owner of a Shared Bundle



1. A Group Share icon will appear beside each bundle for all collaborators.
2. Once selected, a window will immediately appear. This will show the user that created this bundle.

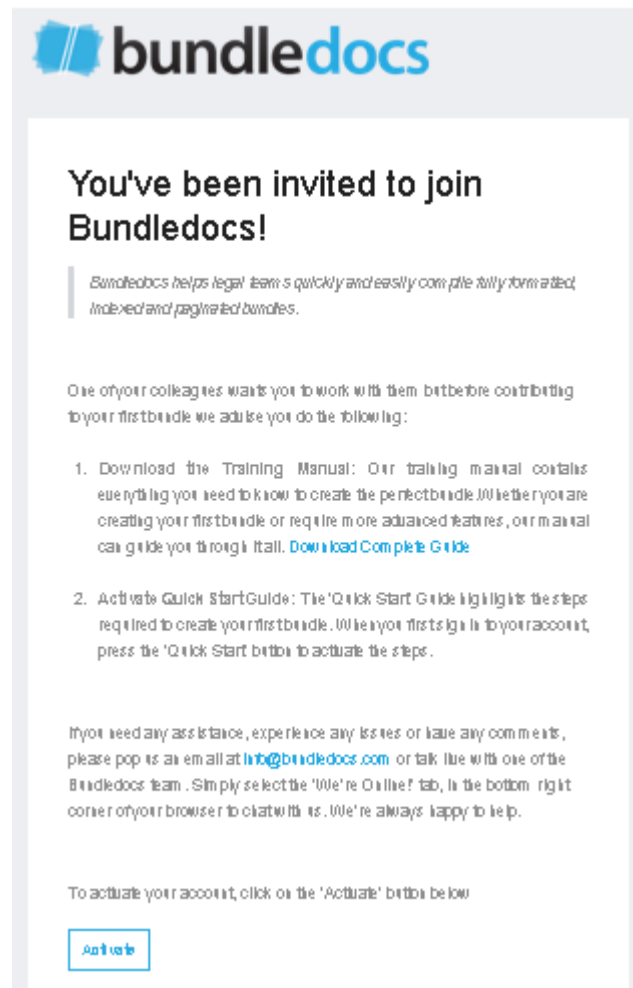
Note: This icon does not appear if you are the person that created the bundle.

What steps does the Invited Collaborator need to take?



1. If the recipient has already created a Bundledocs account, they will receive an email asking them to accept the invitation to collaborate.
2. They will need to select 'Accept' to become a collaborator.

If the invited collaborator has not yet created a Bundledocs account, they will receive the following email:



1. An account has already been created automatically for the collaborator. To complete the account creation, the recipient will need to select 'Activate'. They will be asked to set a password for their account. Once this is done they will be able to login to their Bundledocs account.

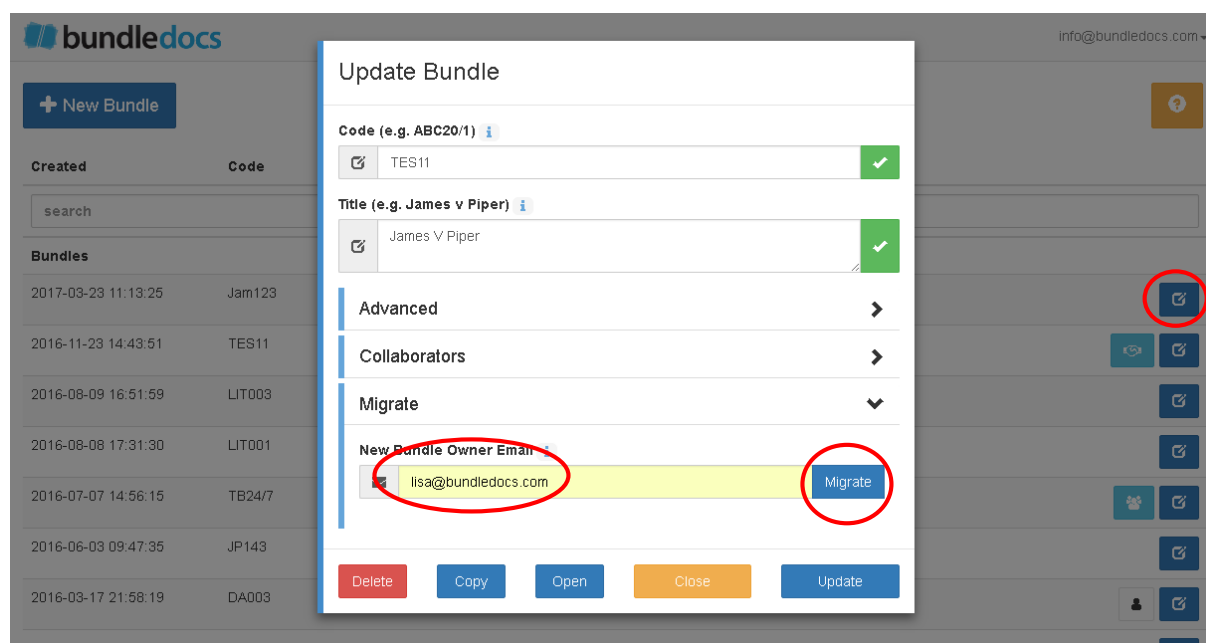
Once the recipient has accepted the invitation to collaborate and/or created their account, the following screen will appear.



1. Simply select the 'You are now a collaborator on this bundle!' to proceed.

Migrate a Bundle

Within Bundledocs you have the option to migrate a case to another user. This option will move ownership of a bundle from one user to another. Therefore, this step will remove the case from your account and it will instead be moved directly into the recipient's Bundledocs account.



1. Select the 'Edit Details' option. The 'Update Bundle' window will appear.
2. Expand the 'Migrate' section
3. Type the email address of the person you wish to share the case with in the field provided
4. Select 'Migrate'

Update Bundle

Code (e.g. ABC20/1)

✎

TES11

✓

Title (e.g. James v Piper)

✎

James v Piper

✓

Advanced

➤

Share

➤

Migrate

▼

New Bundle Owner Email

✉

lisa@bundledocs.com

Migrate

Existing migrations for this Bundle

lisa@bundledocs.com

✕

Delete

Copy

Open

Close

Update

1. An 'Active Case Migration Invitation' will appear on screen.

Note: You can revoke migration access by selecting the 'X' icon.



info@bundledocs.com has
invited you to take ownership of
the following case!

TES101 - James V Piper

If you do not wish to accept this invitation then please ignore this
message. The invitation will expire in 24 hours.

If you choose to accept this invitation just click on the button below and
follow the onscreen instructions.

Accept Case Migration Invitation

1

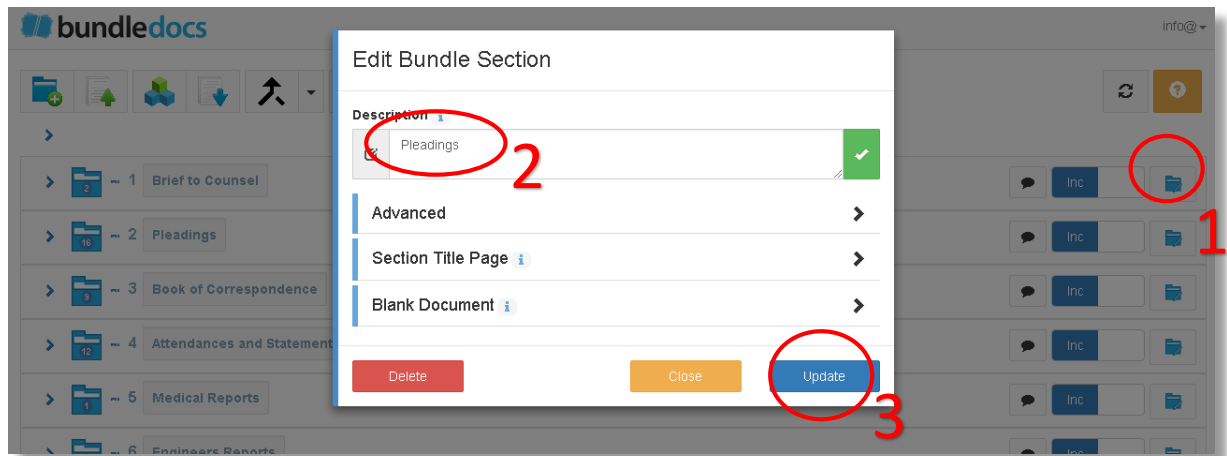
1. The recipient will receive an email inviting them to take ownership of the bundle, as shown above.

Once the recipient has accepted the invitation, the case will immediately appear within their account and will no longer exist within the account from which it was originally sent.

Additional Features:

Edit Section Details:

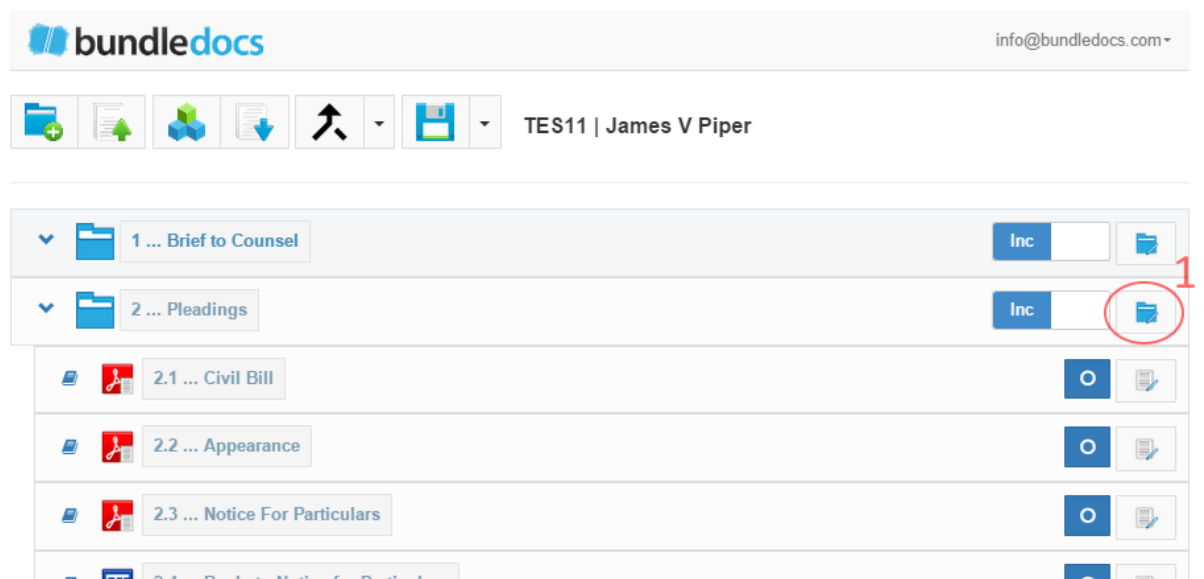
Change Section Name



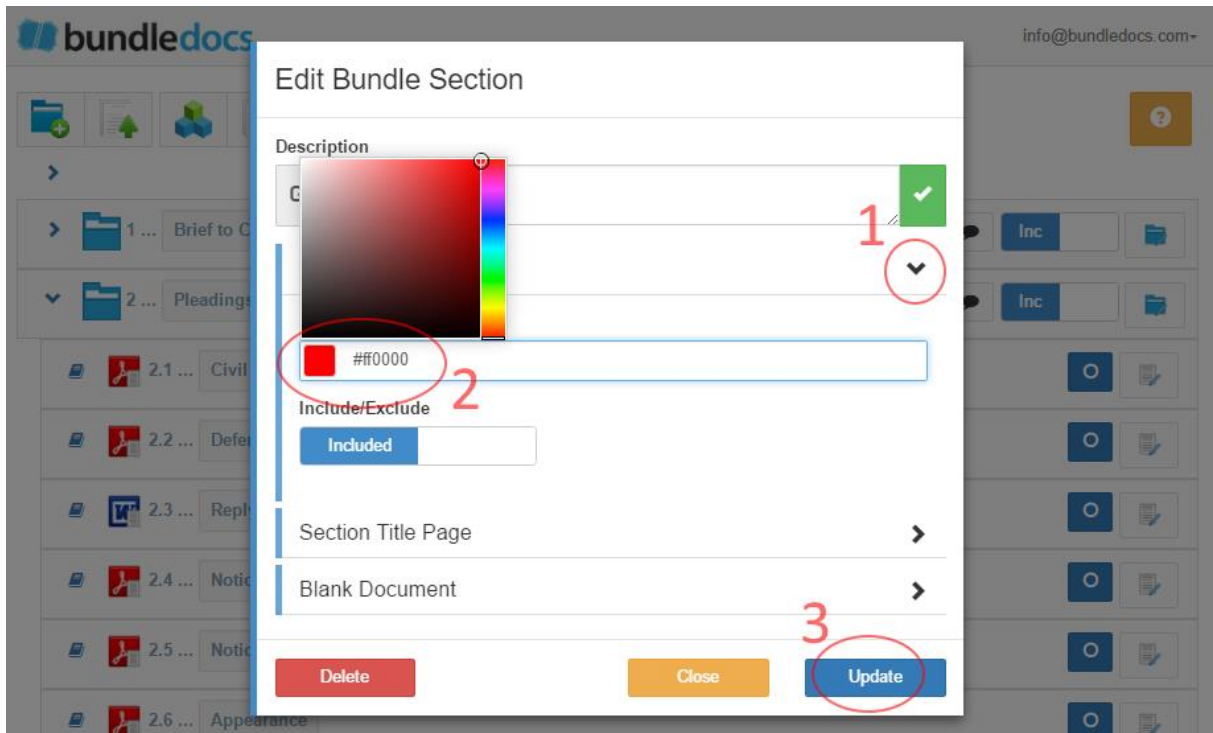
1. Select the 'Edit Details' option. A window will then appear.
2. Type the name within the 'Description' field provided. For example, change "Default Bundle Section" to "Pleadings".
3. Select 'Update'.

Advanced

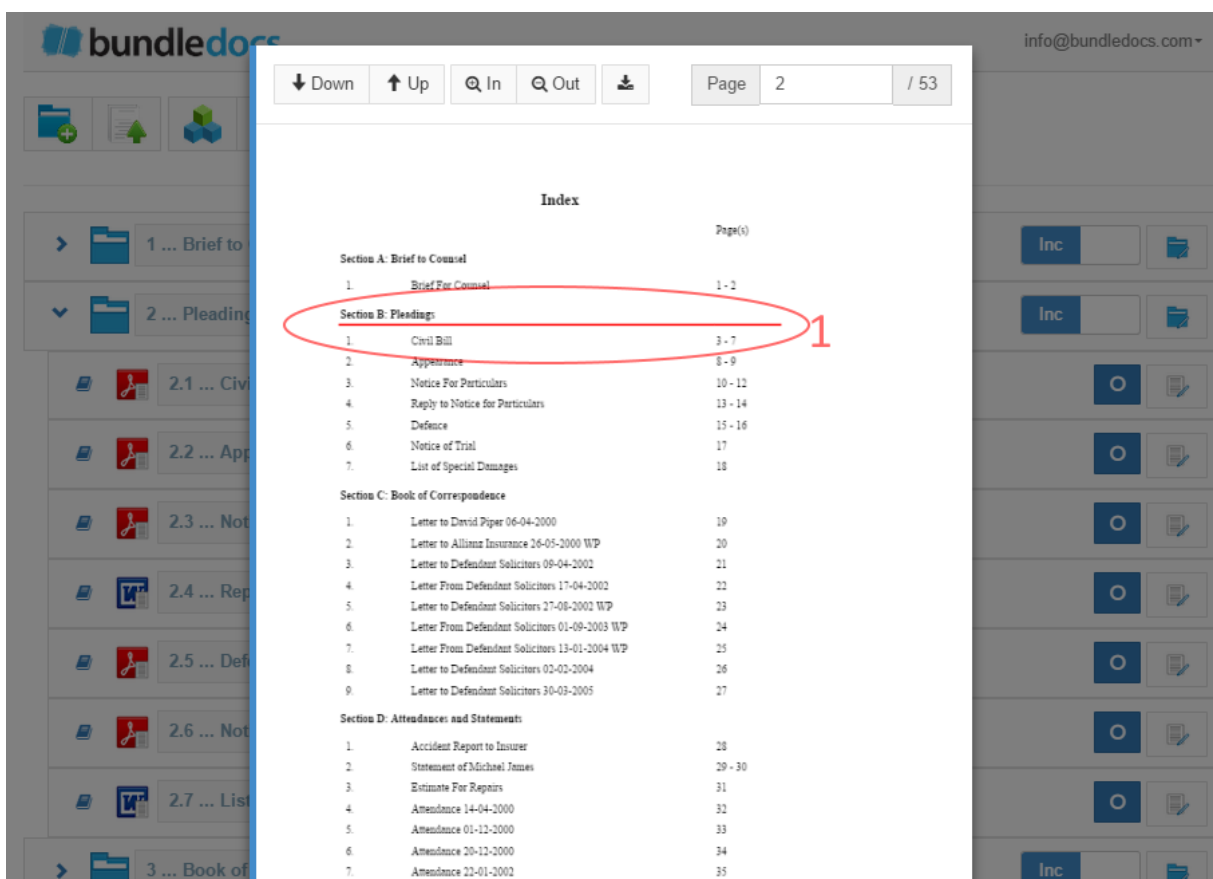
Add a border colour to sections



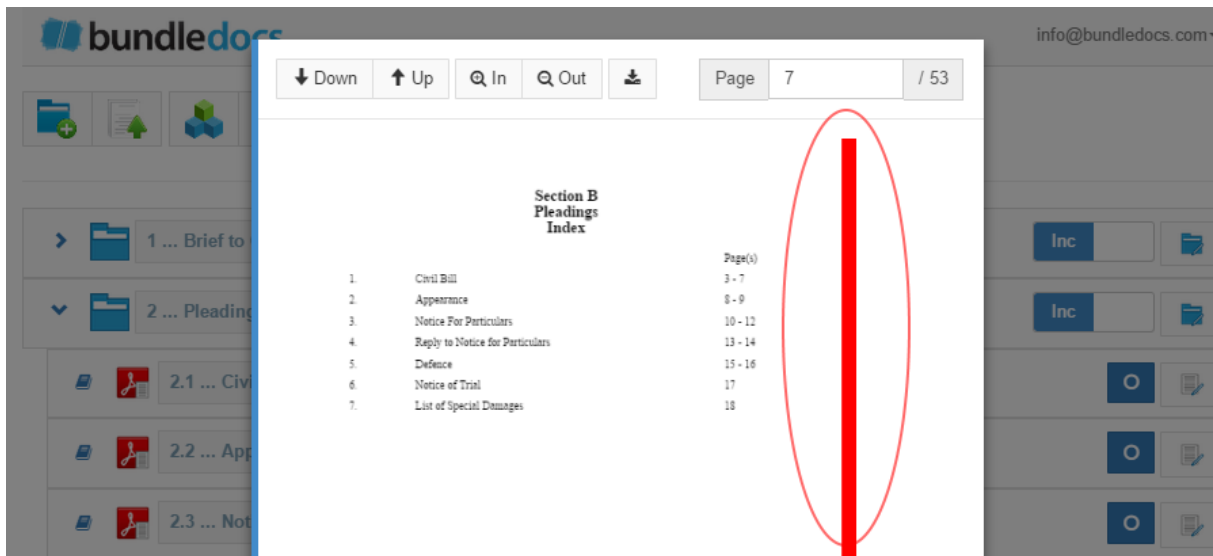
1. Select the 'Edit Details' icon, located to the right of each section.



1. The 'Edit Bundle Section' window will appear. Within the 'Border Colour (optional)' field, click in the area to reveal the colour options.
2. Once this area is selected, a number of colour options will appear. Select a colour.
3. Select 'Update'

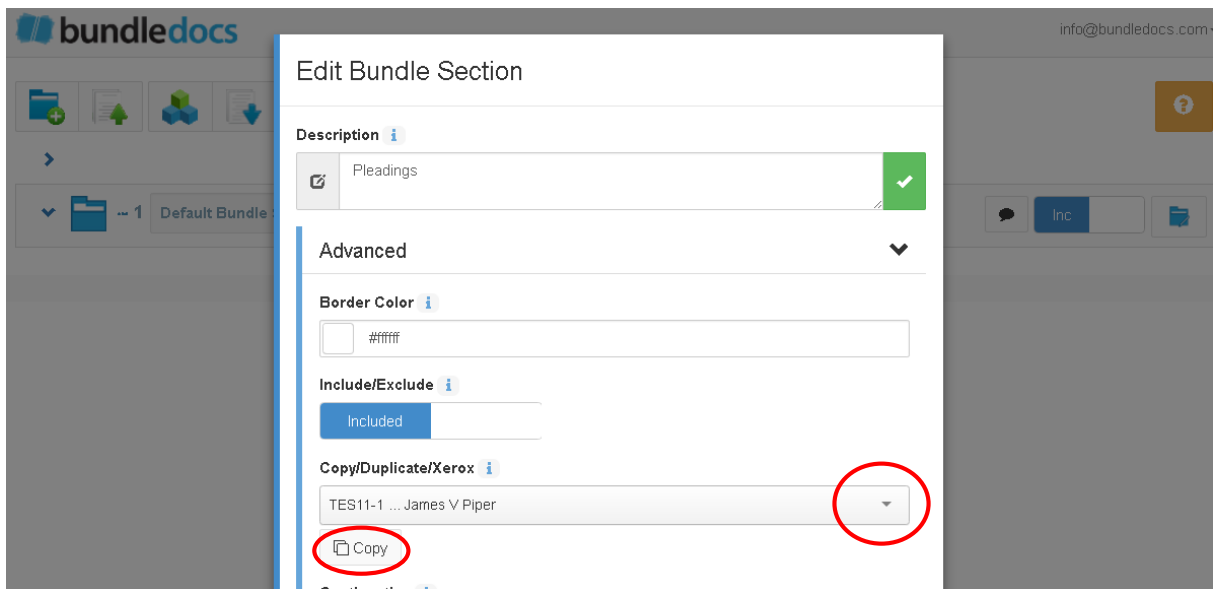


1. The colour option selected for this section will appear in the Index page, as shown above.



1. The colour chosen will also appear on the right side of both the section title and section index page within your completed bundle.

Copy/Duplicate/Xerox



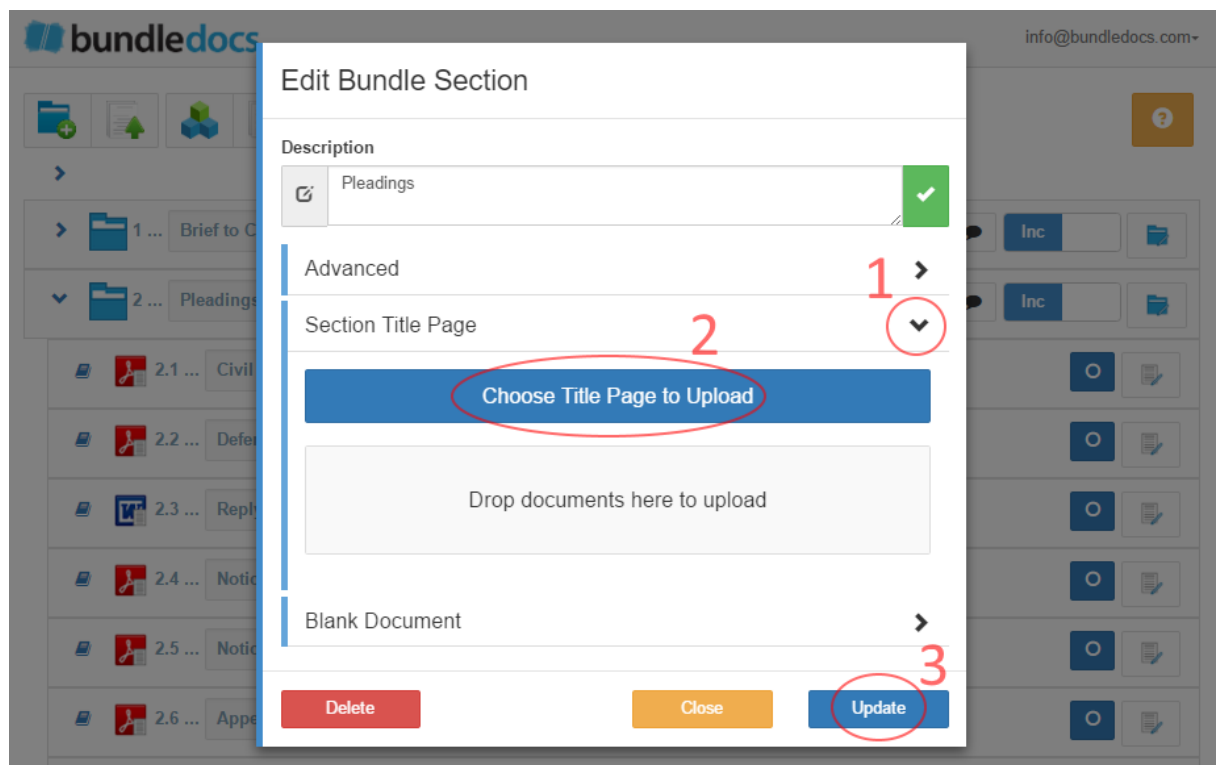
1. Within the 'Edit Bundle Section' window, expand the 'Advanced' section.
2. Within the 'Copy/Duplicate/Xerox' area, select a section from the dropdown.
3. Select 'Copy' to copy this complete section and all documents contained within it.

Section Title Page

With Bundledocs, users have the option to include Bundle Title Pages and/or Section Title Pages within their bundle. Unlike the Bundle Title Page that appears at the beginning of your bundle, the Section Title Pages will appear before each section of your bundle. In order to include Section Title Pages, please follow these instructions:

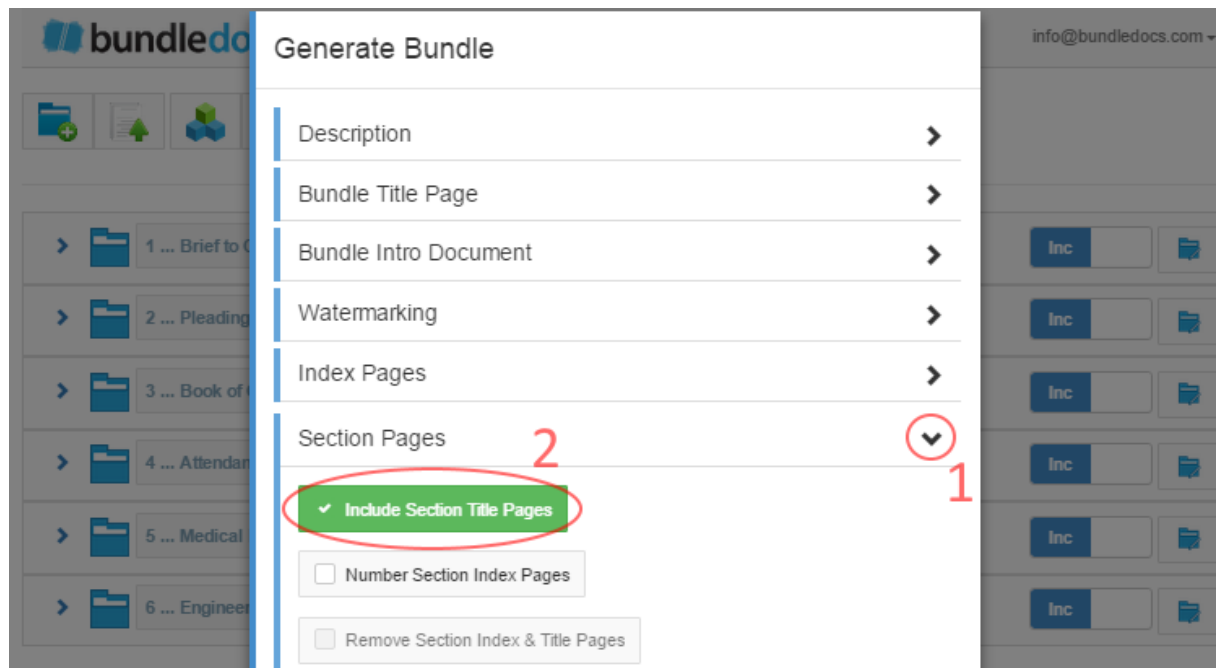


1. Select the 'Edit Section Details' icon. This is located to the right of your section. A window will then appear.



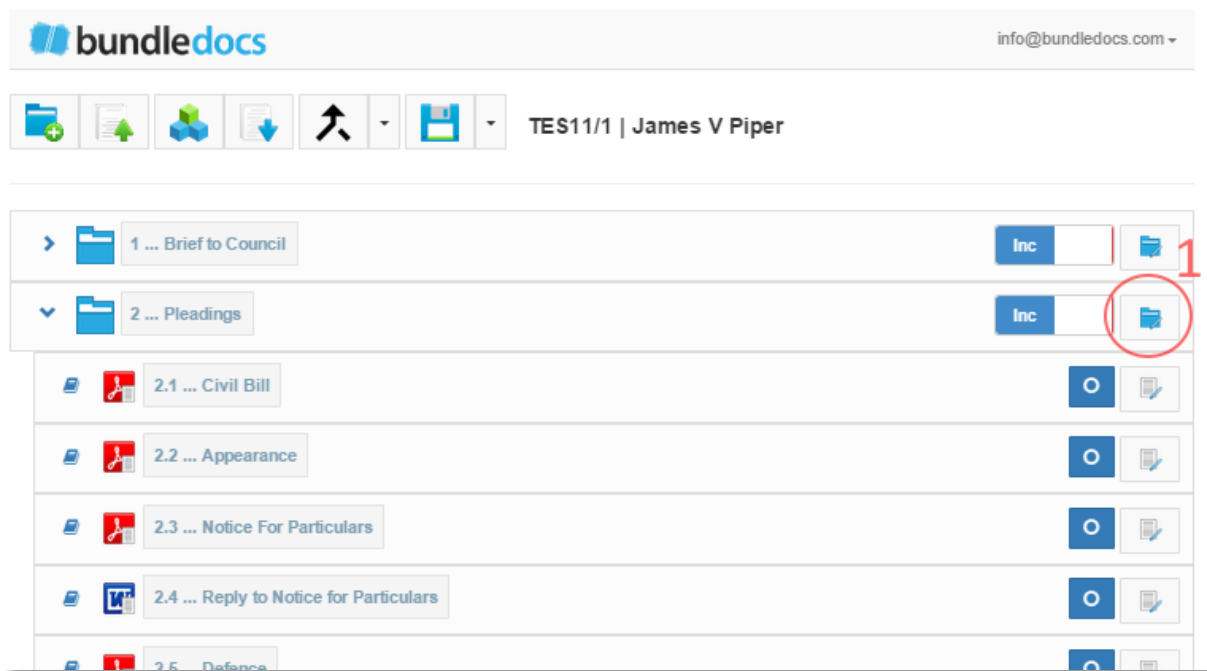
1. Expand the 'Section Title Page' section
2. Select the 'Choose Title Page to Upload' button to upload a title page for this section.
Please note: Simply repeat this steps to include Section Title Pages in additional sections.
3. Once uploaded, select 'Update'.

When generating your bundle, follow these instructions to ensure that your Section Title Pages is included within your completed bundle:

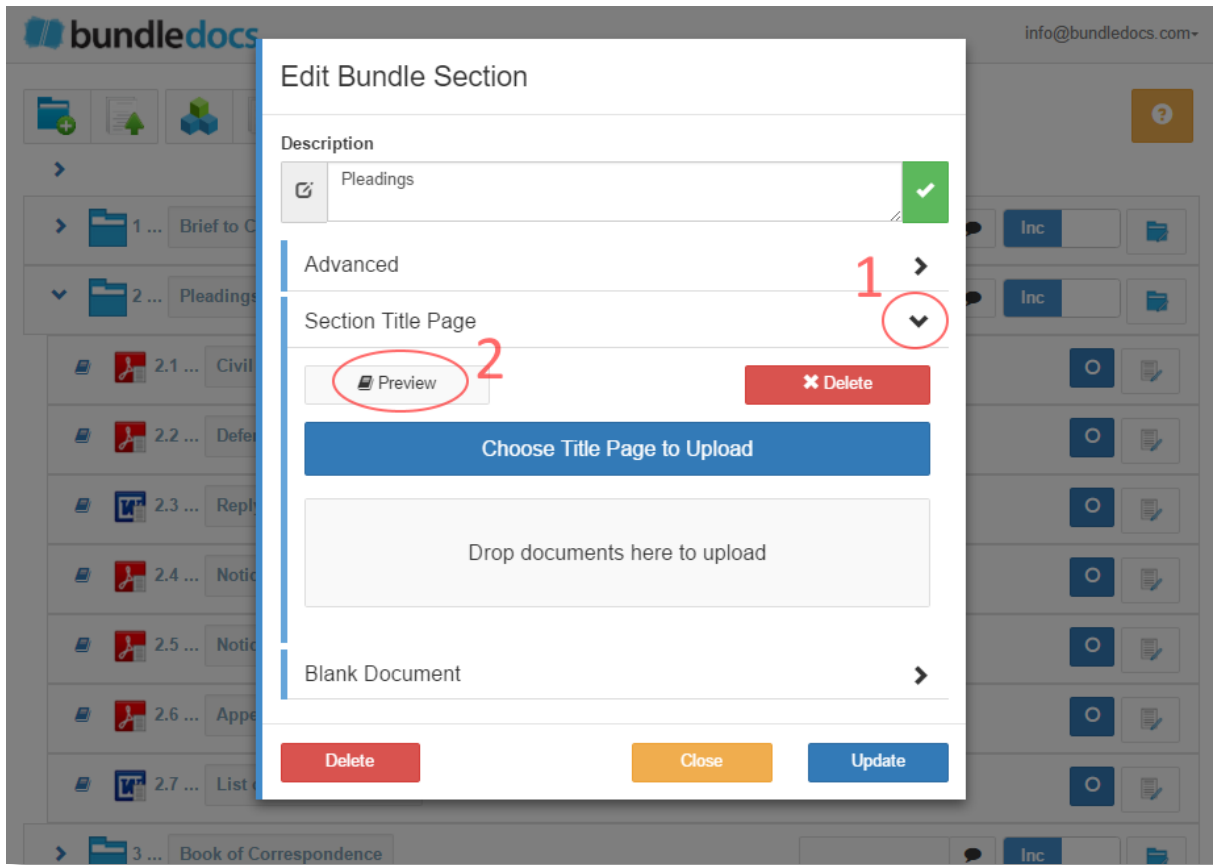


1. Select the '+' next to the 'Index and Section Pages'.
2. Select the 'Include Section Title Pages' option. This will automatically add any uploaded Section Title Pages at the beginning of each section of your bundle.

Download/Preview Section Title Page

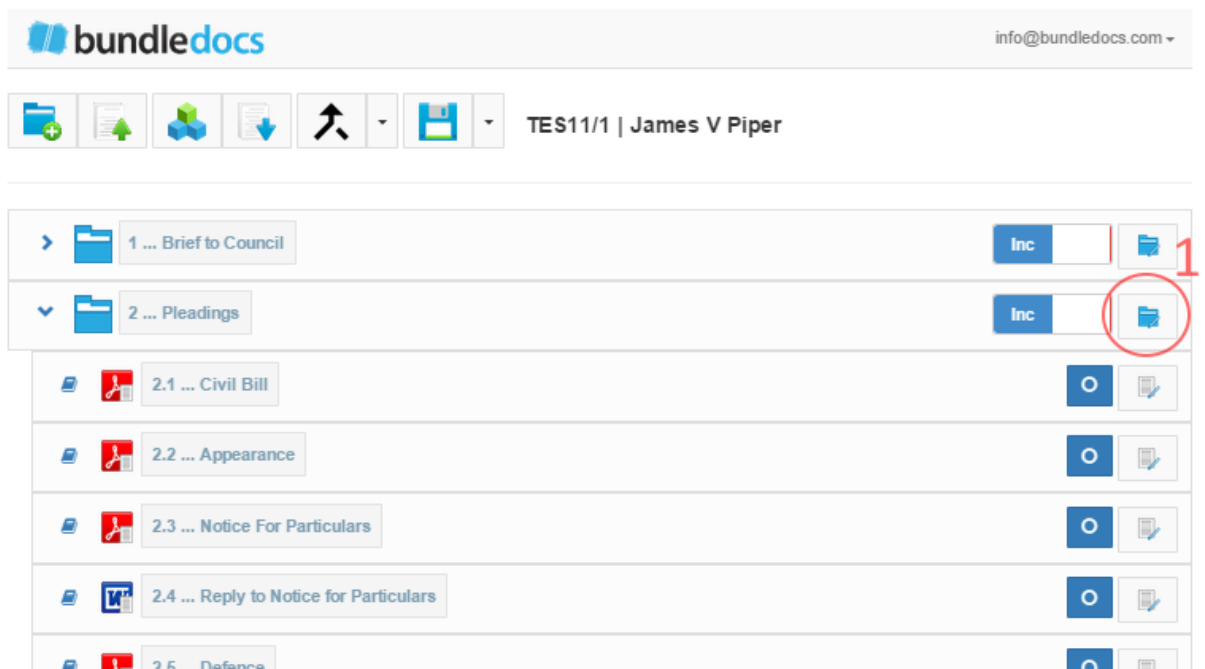


1. Select the 'Edit Details' icon. This is located to the right of your section.

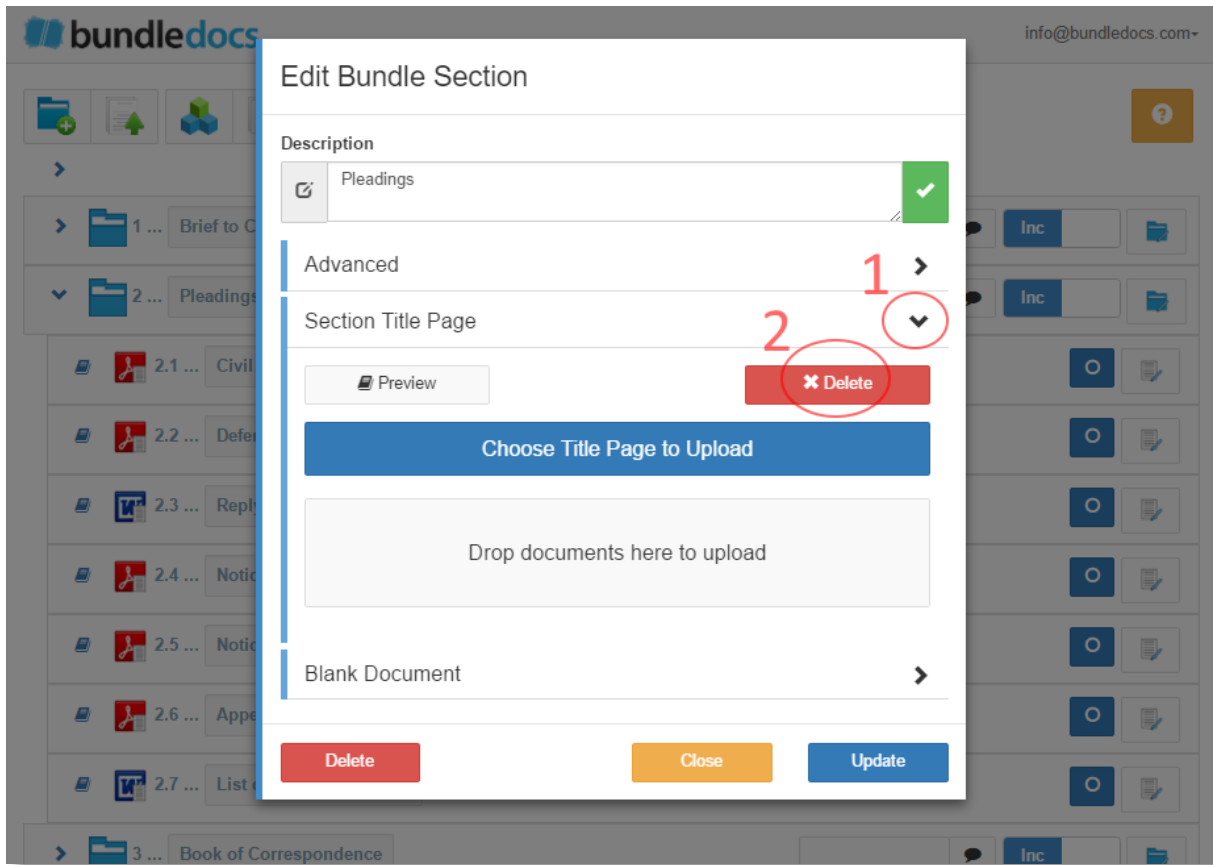


1. Expand the 'Section Title Page' section
2. Select the button (highlighted above) to preview a copy of your section title page. Within the preview window you will also have the option to download a copy of any uploaded file.

Delete Section Title Page



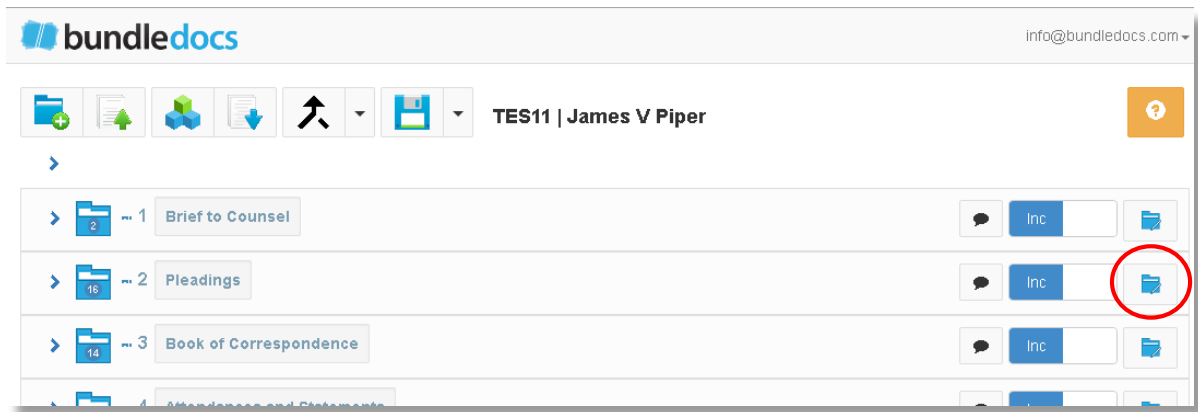
1. Select the 'Edit Details' icon. This is located to the right of your section.



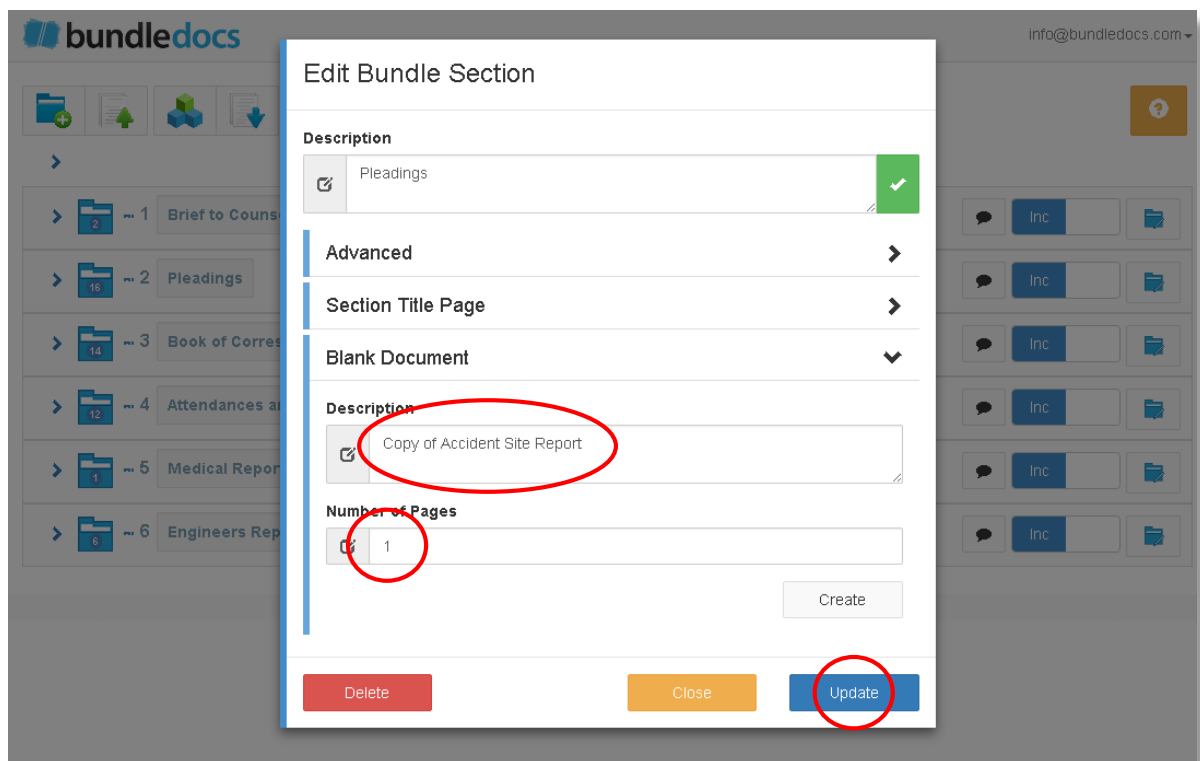
1. Expand the 'Section Title Page' section.
2. Select 'Delete' to remove the title page for this section. You can easily upload another title page if you wish.

Blank Document

The 'Create Blank Document' feature allows users to upload a blank document into their bundle. This feature is perfect for users that want to create their bundle but may not currently have the relevant files. The 'Create Blank Document' feature inserts a blank page in the bundle where the item should be. Furthermore, the blank page is indexed, thus ensuring that your bundle is correctly indexed and paginated.

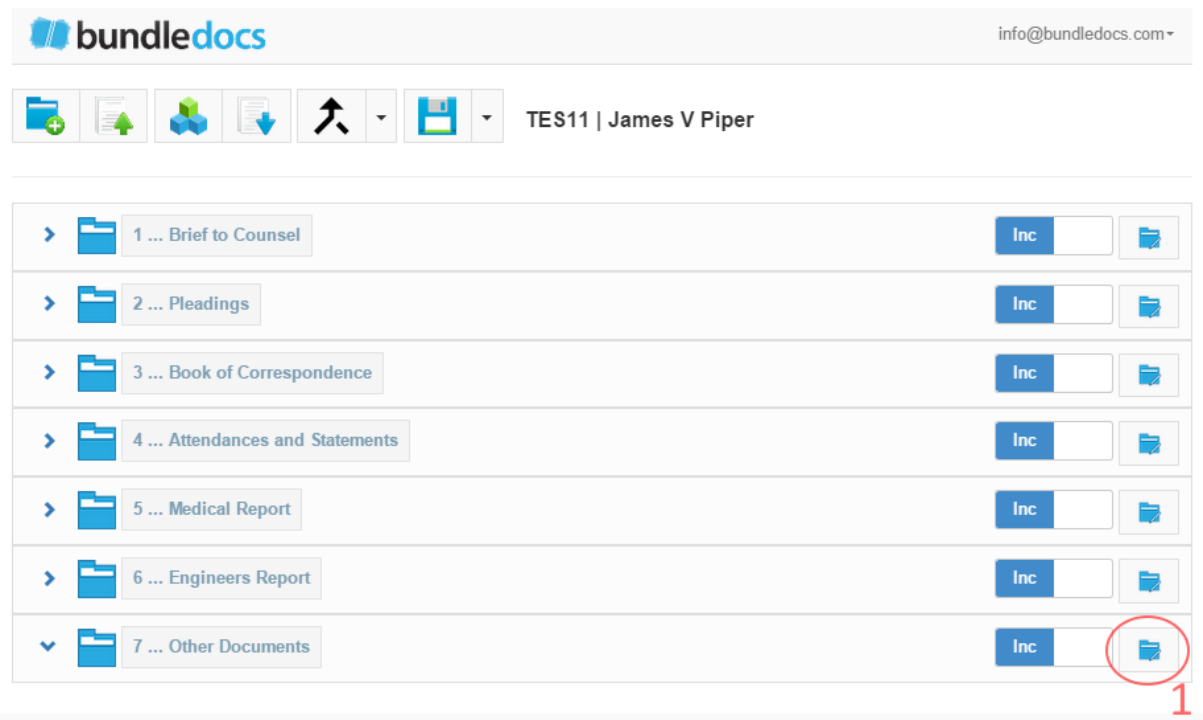


1. Select the 'Edit Details' icon. This is located to the right of your section.

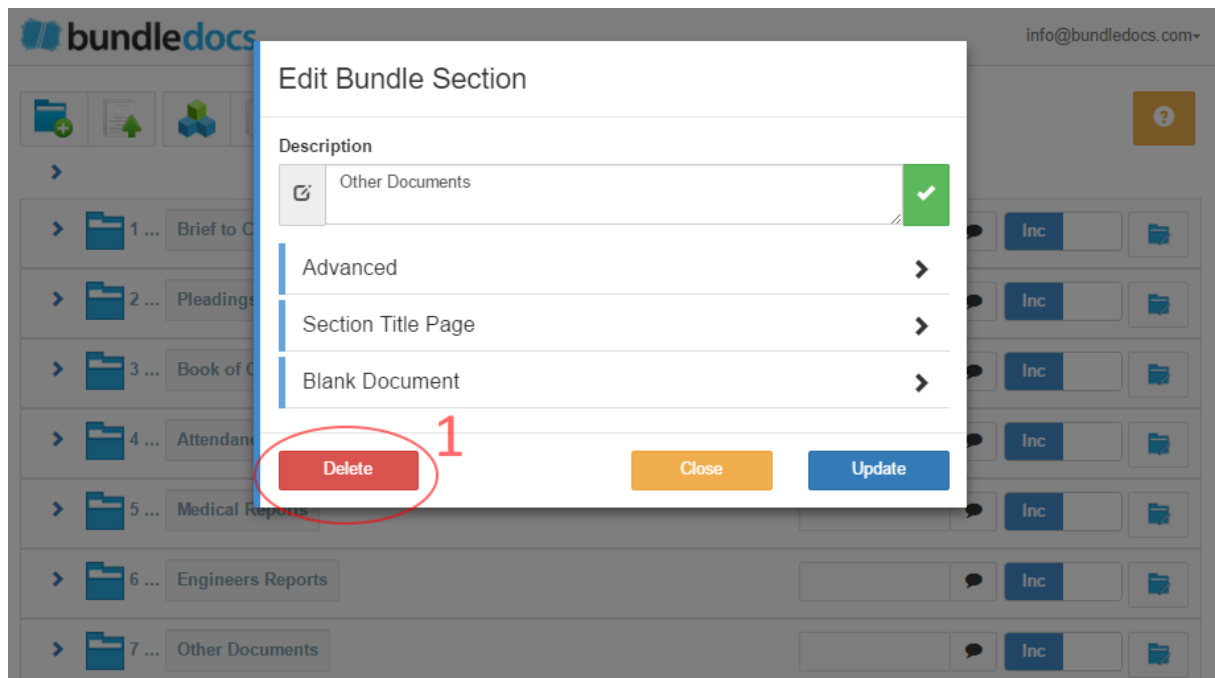


1. Select the '+' beside the 'Create Blank Document' section.
2. Provide a description for the blank document. This will appear in the index.
3. Specify the number of blank pages to be inserted within the bundle.
4. Select 'Create'.

Delete a Section



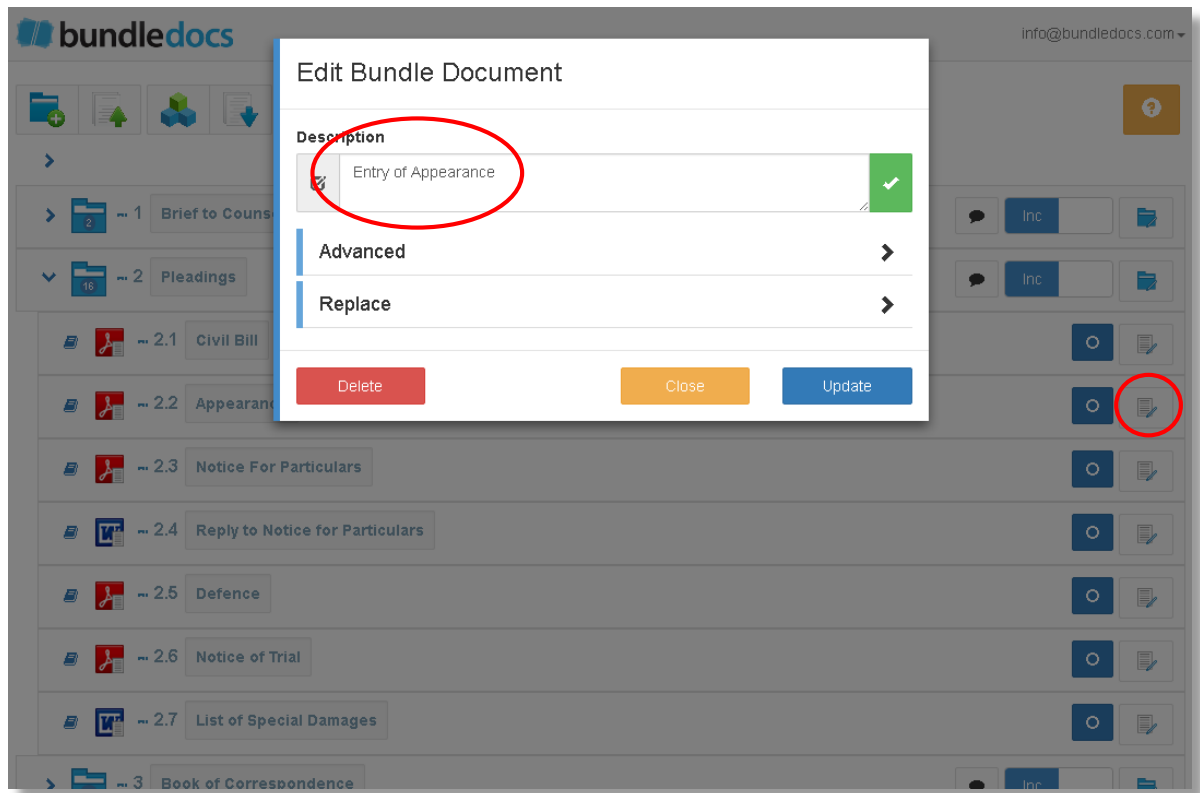
1. Select the 'Edit Details' icon, located to the right of each section. A window will appear.



2. Within the 'Edit Bundle Section', select the 'Delete' button. The section will then be deleted.

Edit Document Details:

Rename Document



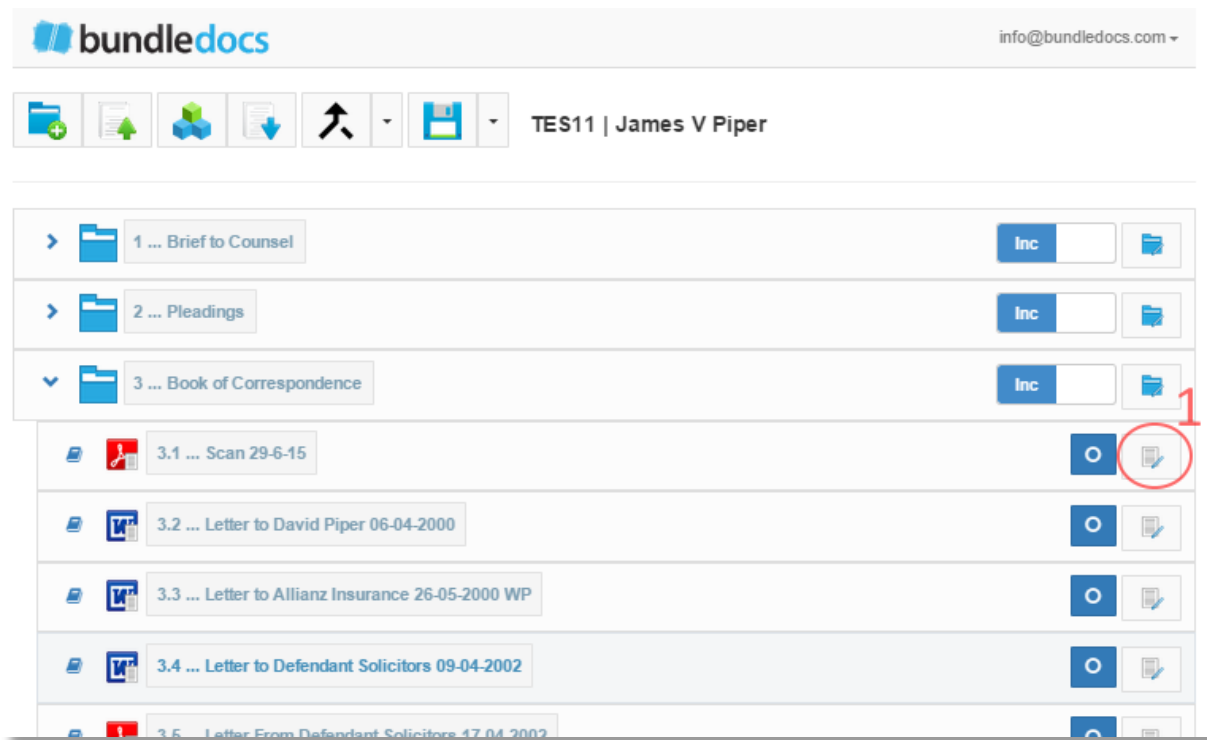
1. Select the 'Edit Document Details' icon. This is located right of your document.
2. Within the 'Description' field, type the new name for the document
3. To complete, select 'update'.

Top Tip! Remember to quickly rename any document or section, simply double click the title to easily re-name

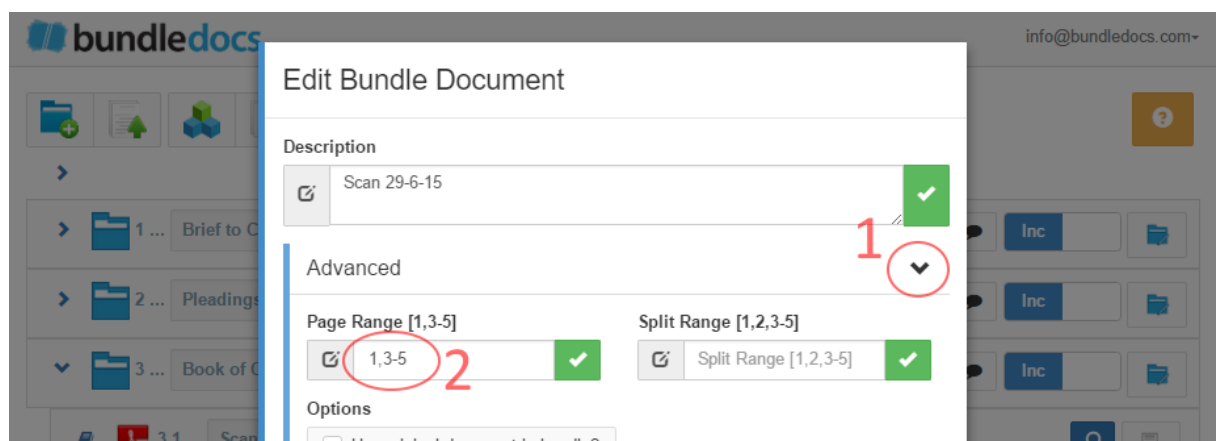
Advanced

Page Range

Our Page Range feature enables you to specify what pages (of any uploaded document) you would like included within your bundle. This is great if you do not want specific pages included within your bundle. Let's take a closer look...



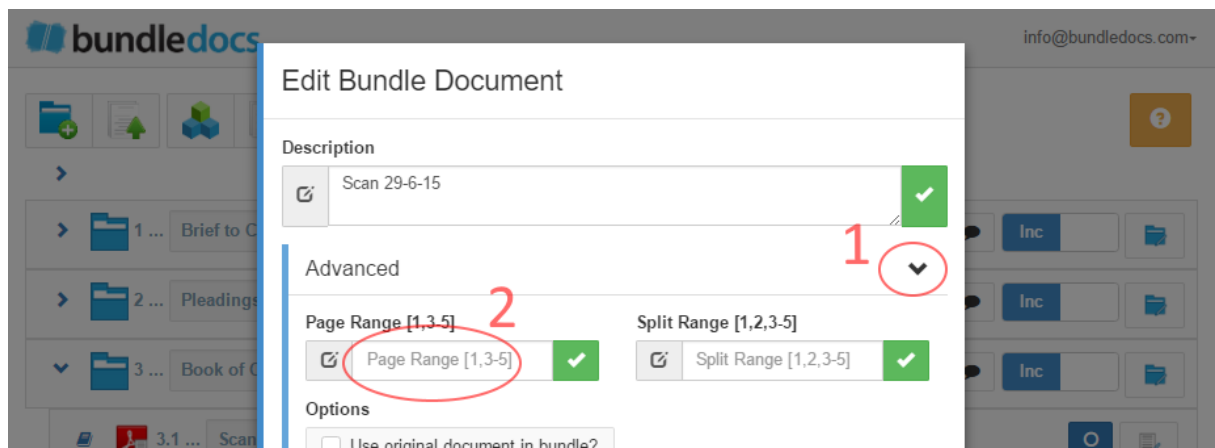
1. Select the 'Edit Document Details' icon. This is located right of your document.



1. Within the Page Range section, choose which pages you would like included within your bundle. Based on the above example, we are choosing to include page 1 and pages 3-5. Therefore, we are choosing to exclude page 2.
2. Click update.

Top Tip: Remember not to include spaces when typing your page range.

Remember, you can revert to the original document at any time. Simply do the following:



1. Clear the 'Page Range' field. Doing so will restore the document to its original form ie all pages included.
2. Select 'Update'.

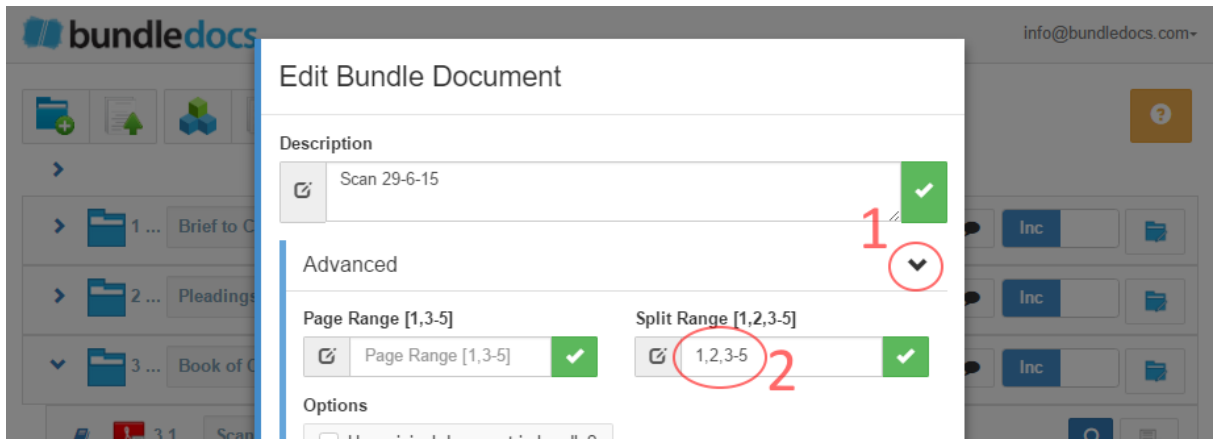
Split documents (Split Range)

The Split feature makes dividing documents simple. It is designed for users that only need specific pages from large documents included within their bundle. This is particularly useful for firms that scan large amounts of documents. Users simply specify how they want their documents to be split and Bundledocs will create individual PDF files of the sections specified.

Commands to know:		
Comma	,	A page number preceding the comma will be created within a single PDF.
Dash	-	A dash located between two numbers will create a single PDF with multiple pages.

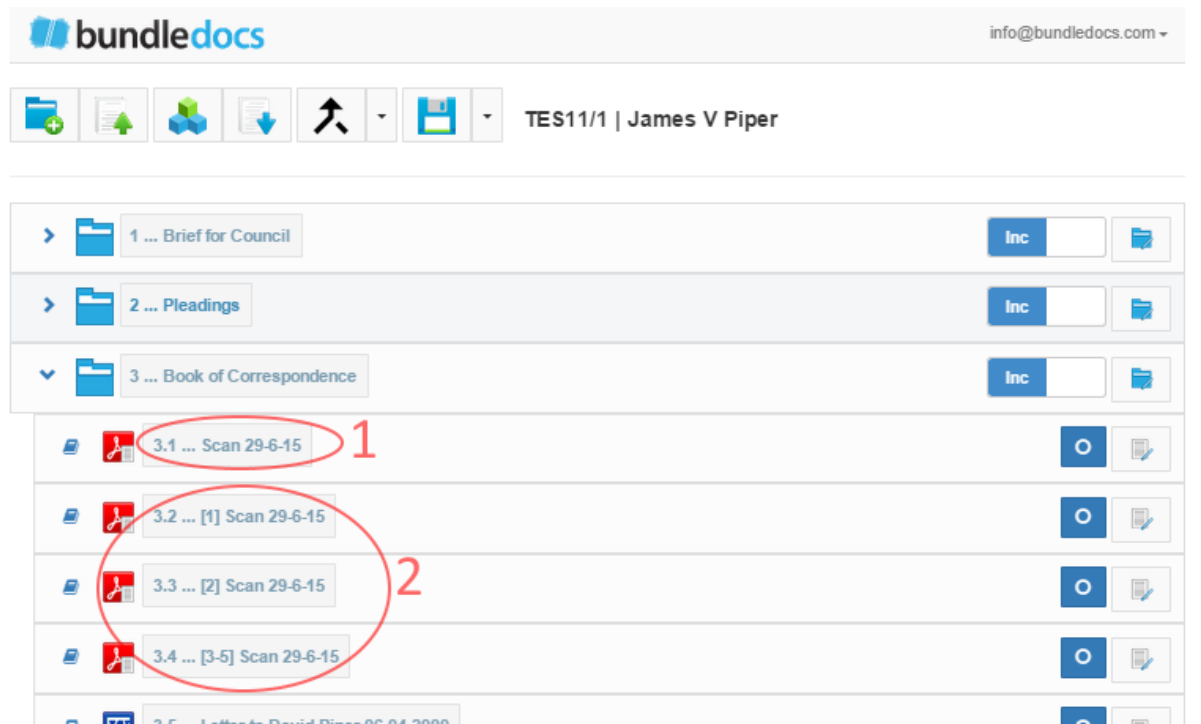
The screenshot shows the Bundledocs web interface. At the top, there's a header with the 'bundledocs' logo and the email 'info@bundledocs.com'. Below the header is a navigation bar with icons for adding files, folders, and documents, and a search bar. The main content area shows a list of folders and files. The folder '3 ... Book of Correspondence' is expanded, revealing a list of files. The first file, '3.1 ... Scan 29-6-15', is highlighted. A red circle and the number '1' point to the 'Edit Details' icon (a document with a pencil) next to this file.

1. Select the 'Edit Details' icon, located next to the file you want to split.



1. Select Advanced to expand this section
2. Choose the Split Range to specify how you want to split the document. In our example we have selected 1, 2, 3-5. With this example Page 1 will be included in one PDF; Page 2 will be included in another PDF; and pages 3, 4 and 5 will be included in another single PDF document.
3. Select Update.

Top Tip: Remember not to include spaces when typing your split range.

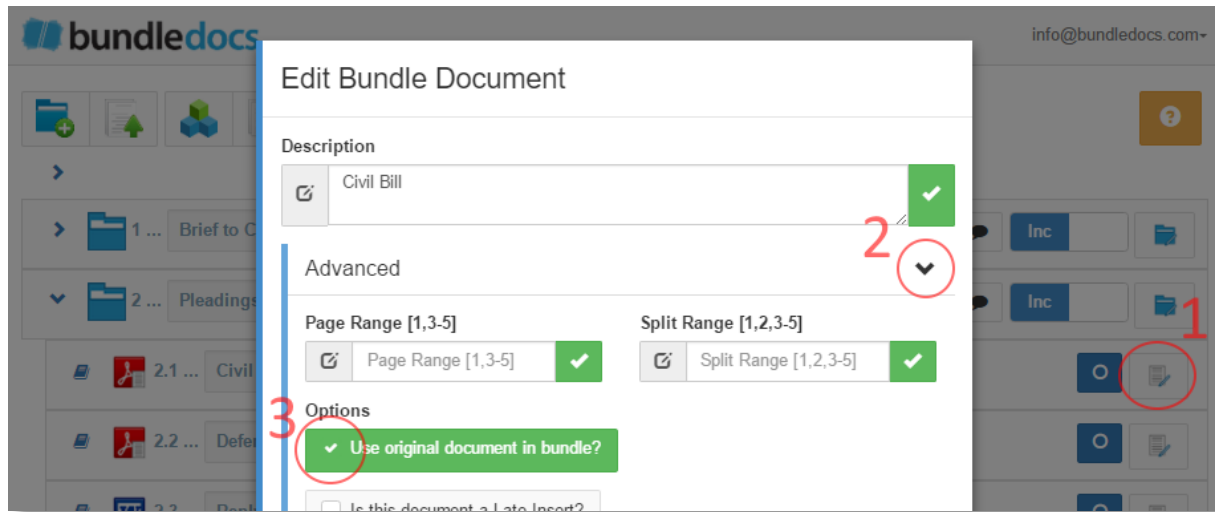


1. The original document remains.
2. The new split PDF documents are inserted within the same folder.
You can simply double click to easily re-name any document. Then drag and drop the documents where you want them to appear.

Use Original Document in Bundle

With Bundledocs you can upload documents, images etc. and your files will be automatically scaled to fit A4 size. This ensures consistency when working with a wide range of documents. In some cases however, you may want to keep the original scales. That's where our 'Use Original Document in Bundle' option comes in. It is particularly useful when working with maps, landscape documents etc.

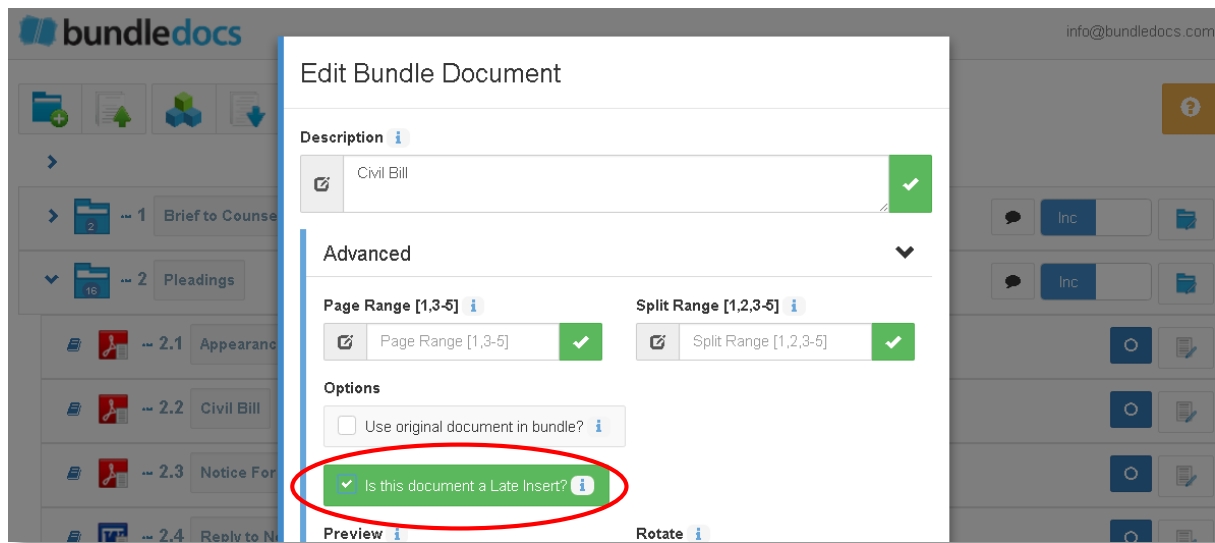
Remember: Currently this feature is only available for PDF files.



1. Select the 'Edit Details' icon. This is located to the right of any uploaded document.
2. Expand the 'Advanced' section.
3. Select the option 'Use original document in bundle'.
4. Click 'Update' to complete.

Top Tip: Within your account setting you can set this option as a default for all uploads.

Late Insert Document



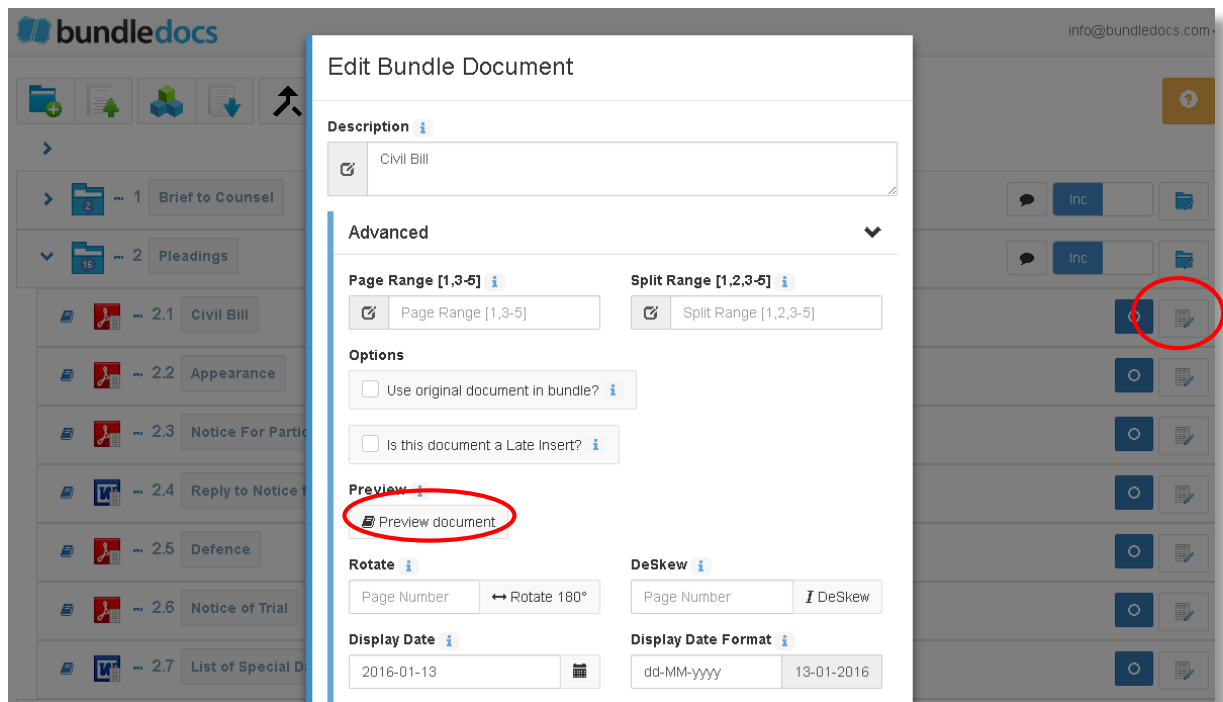
1. Within the 'Edit Bundle Document' window, expand the 'Advanced' section.
2. Select the option 'Is this document a Late Insert?'.
3. Select 'Update'.



1. A box will automatically appear around your document. This will only appear on-screen as an indication to illustrate that this document is a late insert.

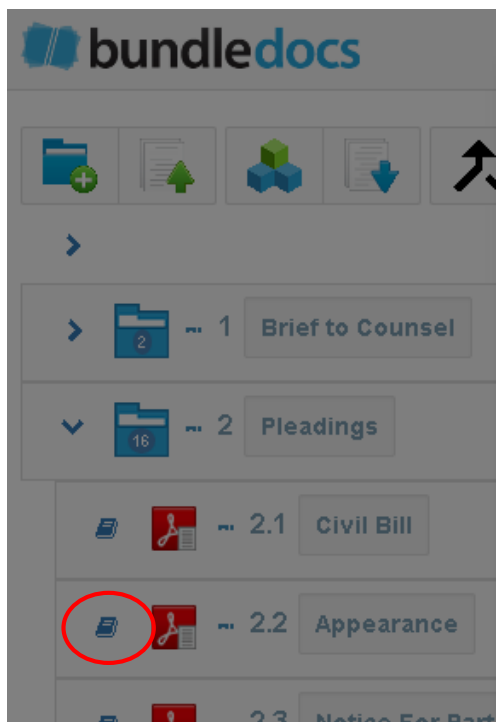
Once generated any document that has been marked as a late insert will have alternative numbering applied. Therefore this will not affect your original document numbering.

Preview an Uploaded Document

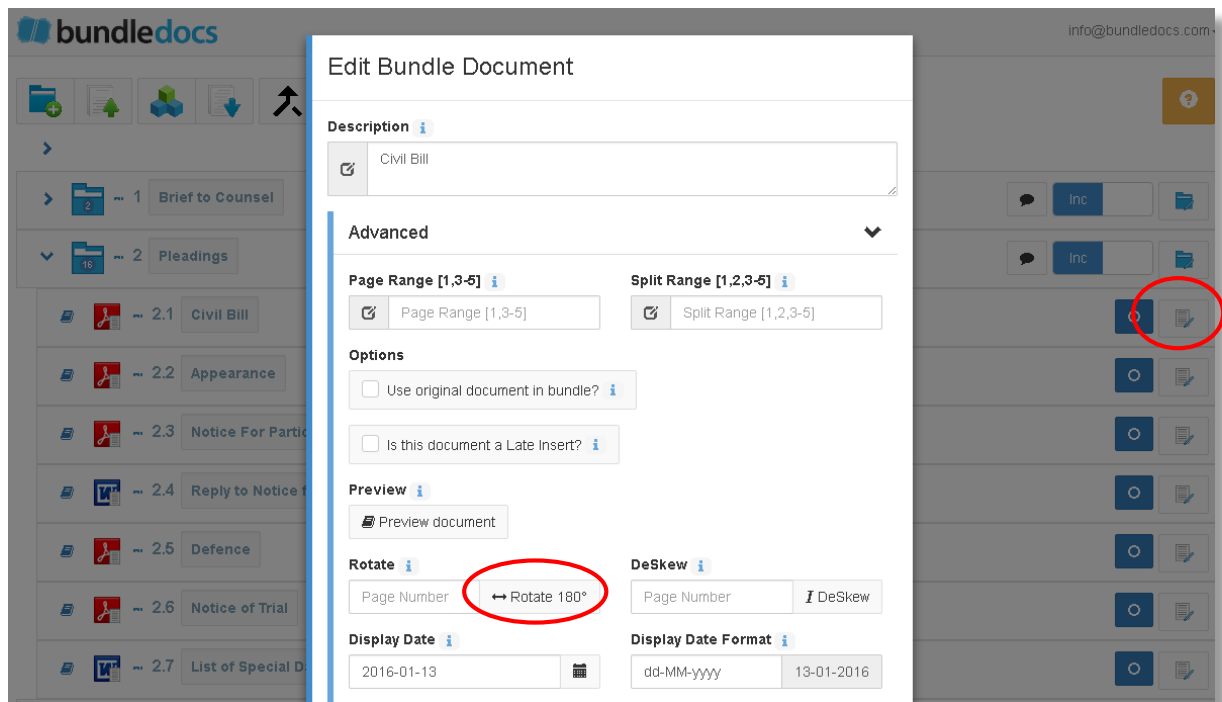


1. Select the 'Edit Details' icon and a window will appear.
2. Within the 'Advanced' section, select 'Preview Document' to launch a preview window. From this you will be able to scroll through and review the contents of your document.

Top Tip: Did you know you can quickly preview any uploaded document using the icons that appear to the left of any uploaded document. Simply click once on the icon and the preview window will automatically launch.



Rotate an Uploaded Document



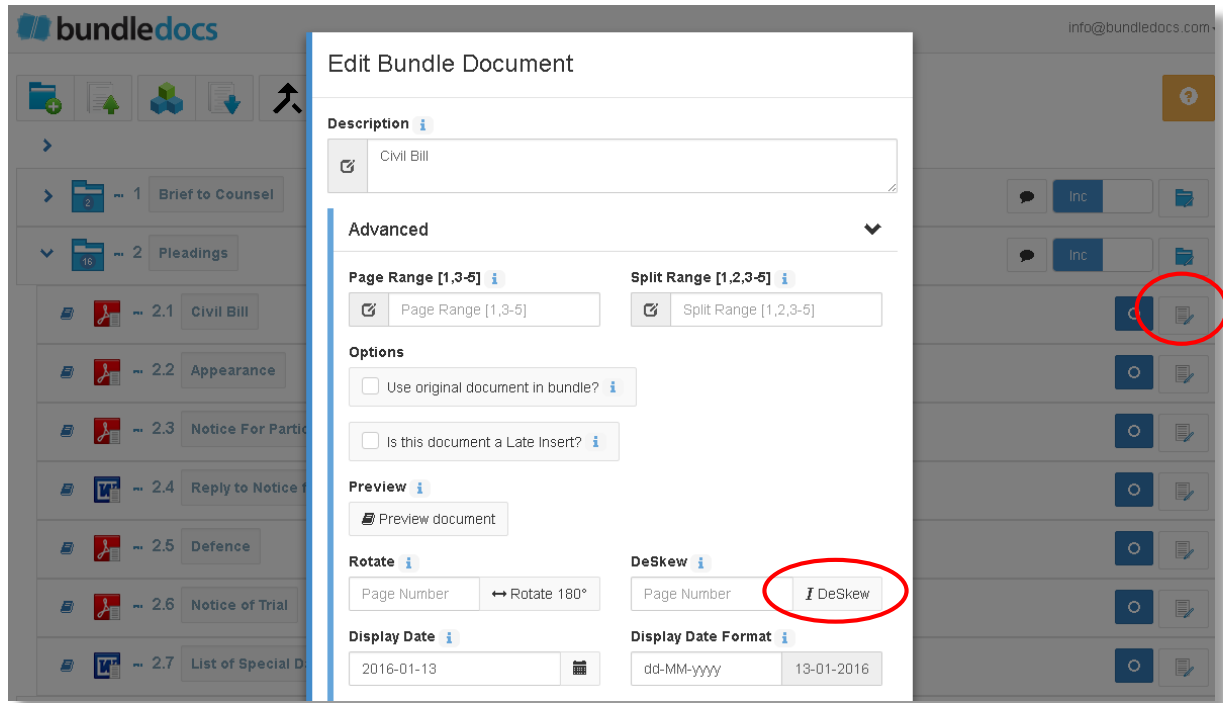
1. Select the 'Edit Details' icon and a window will appear.
2. Within the 'Advanced' section, you can rotate the entire document or select individual pages to rotate.
 - a. Rotate All Pages: To rotate all pages of this uploaded document, select 'Rotate180°'
 - b. Rotate Individual Pages: To rotate individual pages of any uploaded document, simply insert the page number in the area provided and select 'Rotate180°'.

Once selected, a preview window will automatically appear. From this you will be able to review the changes made. Simply click away to exit the preview screen.

If at any point you would like to revert to the original version of the document, simply select this option again.

DeSkew an Uploaded Document

The 'DeSkew Document' feature allows you to easily re-align any uploaded document. This is great for those that work with scanned documents that may have been scanned in and appear slightly off centre.



1. Select the 'Edit Details' icon and a window will appear.
2. Within the 'Advanced' section, you can deskew the entire document or select individual pages.
 - a. DeSkew All Pages: To deskew all pages of this uploaded document, select 'DeSkew'
 - b. DeSkew Individual Pages: To deskew individual pages of any uploaded document, simply insert the page number in the area provided and select 'DeSkew'

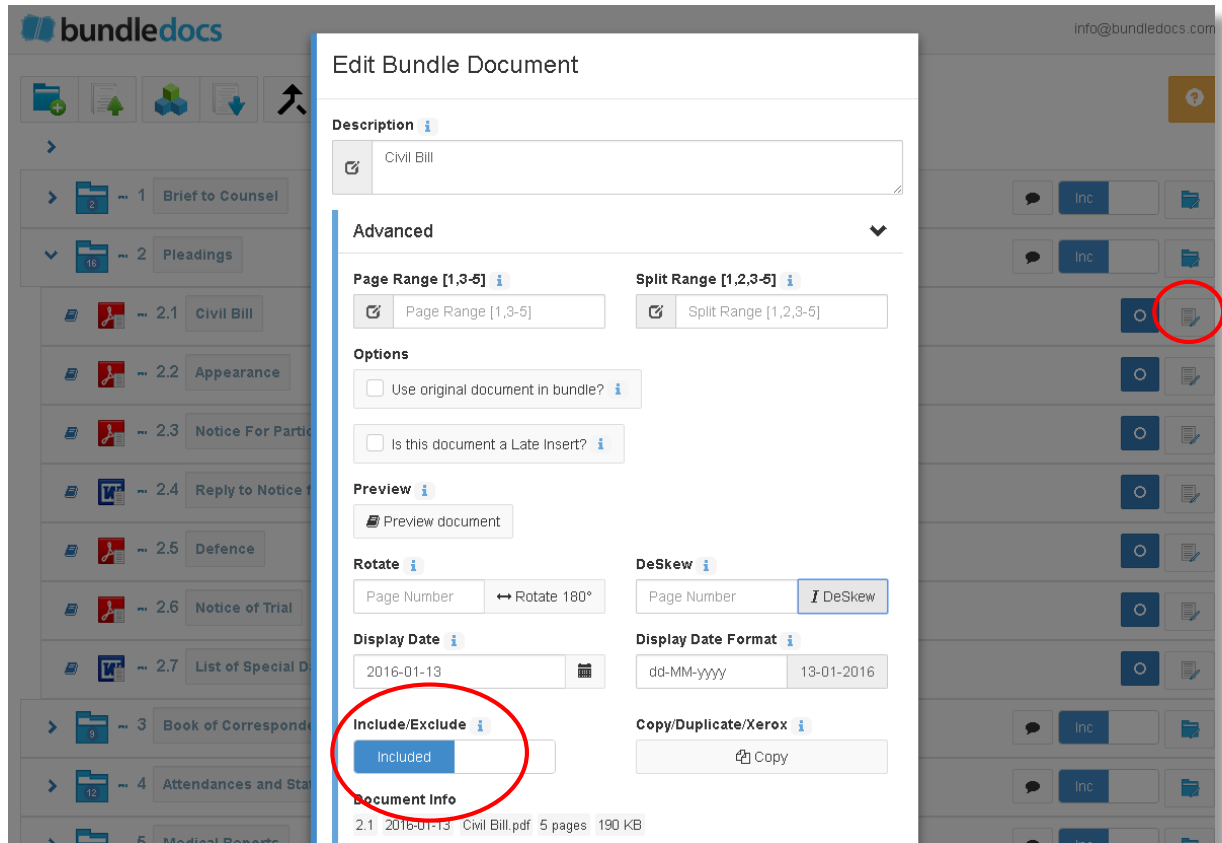
Once selected, a preview window will automatically appear. From this you will be able to review the changes made. Simply click away to exit the preview screen.

If at any point you would like to revert to the original version of the document, simply select this option again.

Display Date & Display Date Format

Please see our 'Working with Document Dates' section for more information.

Include/Exclude a Document

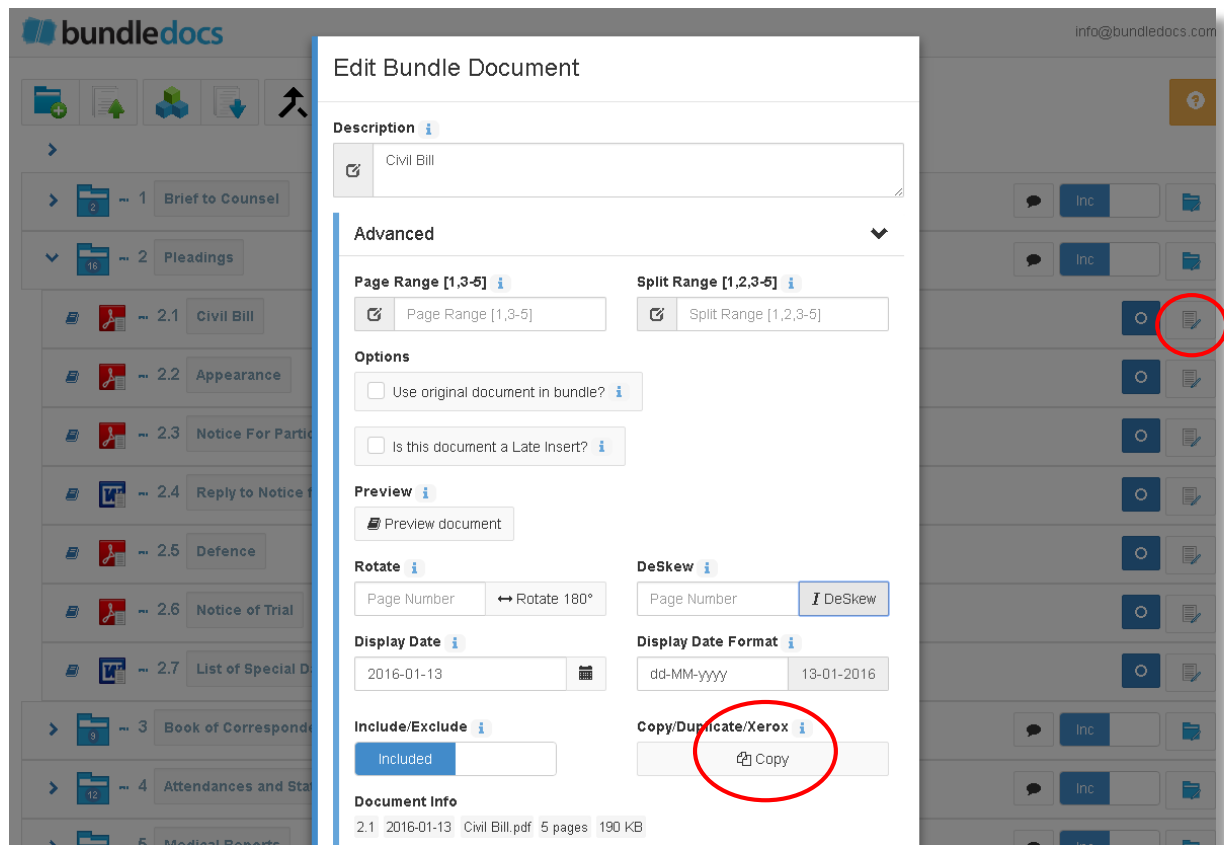


1. Select the 'Edit Details' icon, located to the right of your file.
2. The blue 'Inc' icon indicated that this document is 'included' in your bundle. This is the default setting. The red 'Exc' icon indicates that this document is 'excluded' from your bundle. Simply select the icon to choose to inc/exc this document.

Note: Any 'excluded' document will appear with a strike-through, within your account.



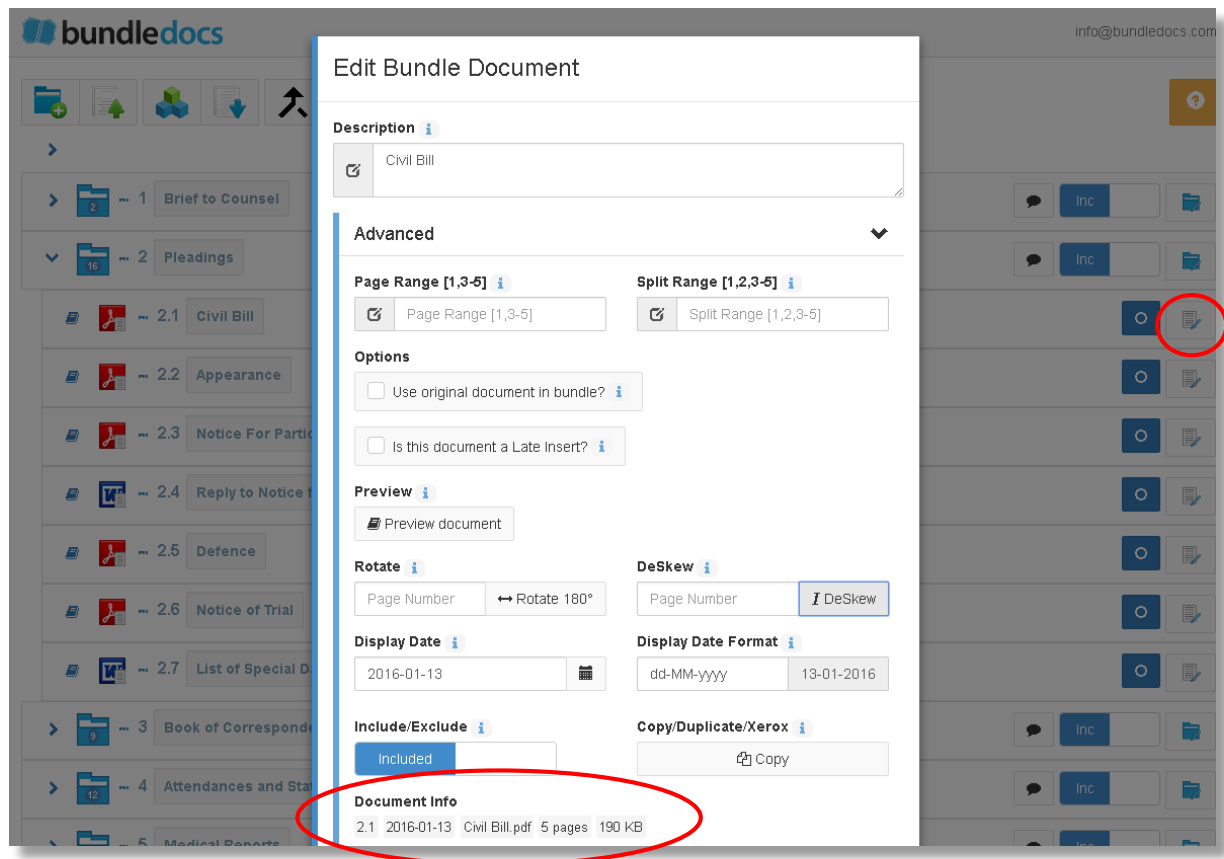
Copy a Document



1. Select the 'Edit Details' icon, located to the right of your file.
2. Within the Advanced section, select 'Copy' to create a copy of your document.
3. The copy of your document will become immediately available. Simply double click to rename.

Note: Any copied documents will immediately appear at the end of this section.

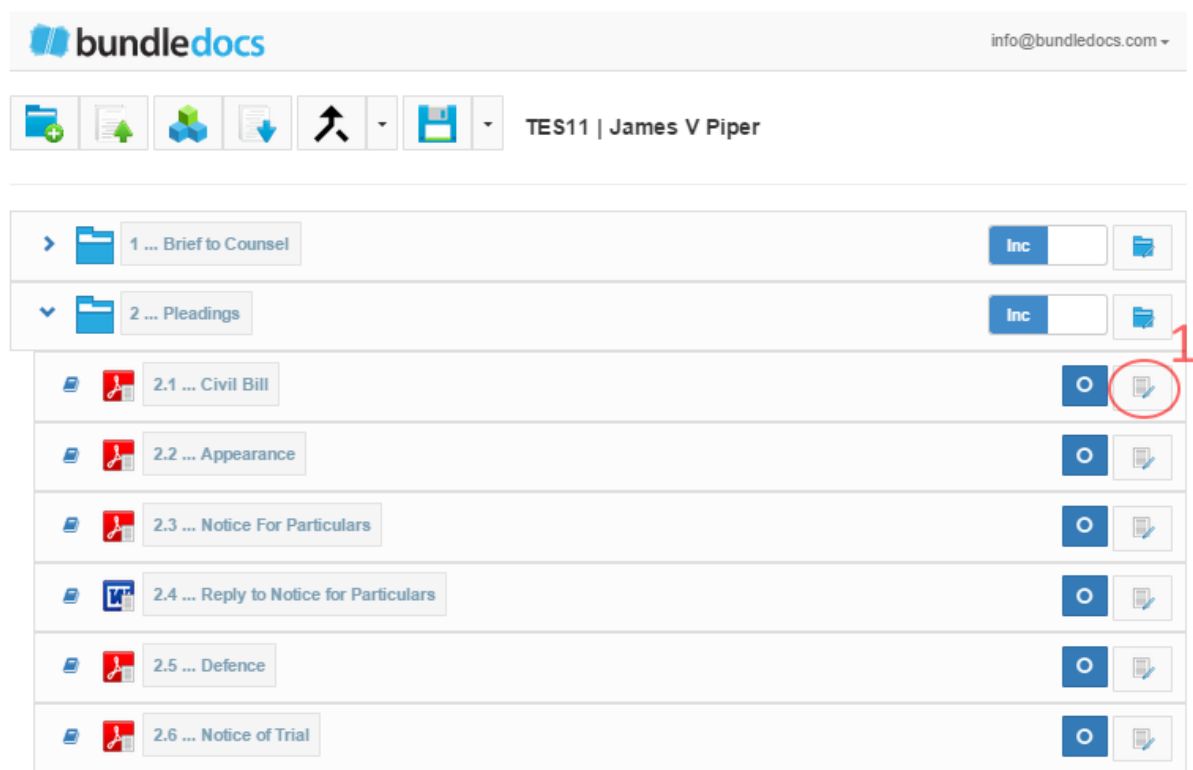
Document Info



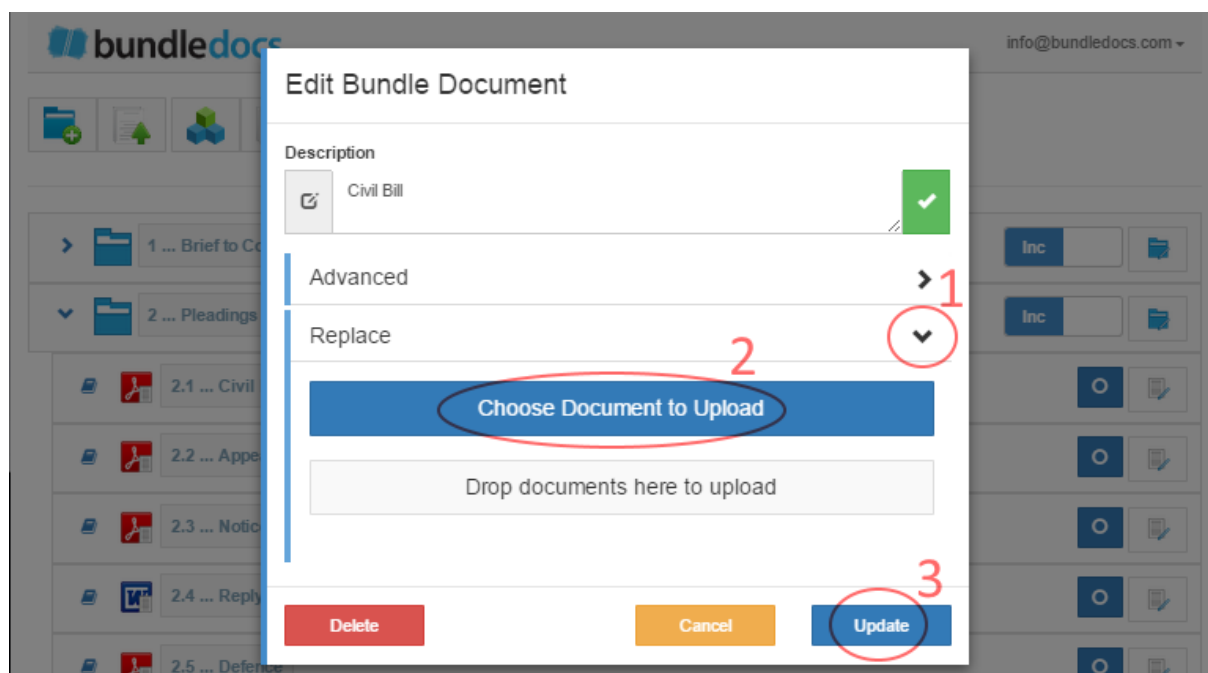
1. Select the 'Edit Details' icon, located to the right of your file.
2. Within the Advanced section you will be able to view the information for this document.
Information includes: Original document date, document name, number of pages, file size.

Replace Document

With Bundledocs you have the ability to easily replace any uploaded document. Simply follow these steps:

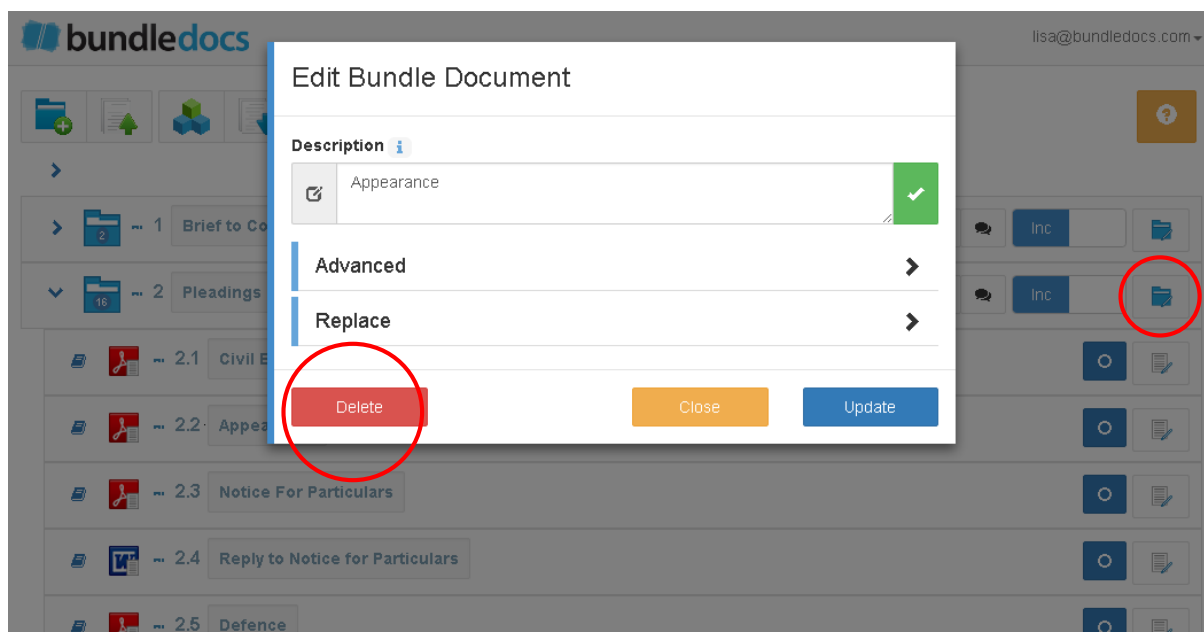


1. Select the 'Edit Details' icon, located to the right of each file



1. Select 'Replace' to expand this section
2. Select 'Choose Document to Upload' and upload the relevant file.
3. Click 'Update'

Delete a Document



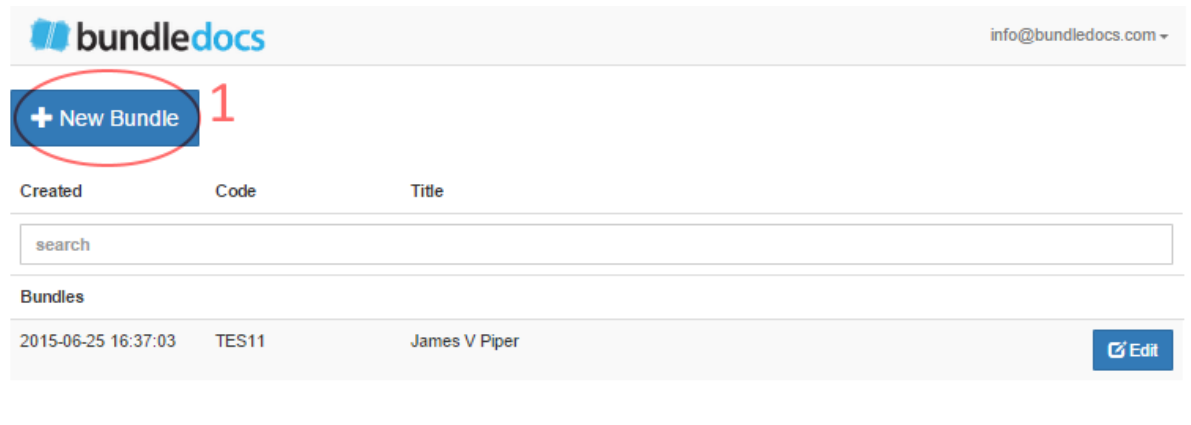
1. Select the 'Edit Document Details' icon and a window will appear.
2. Select the Red 'Delete' button to delete this document.

Top Tip: If you want to delete multiple documents from Bundledocs then simply create a section. Move any document you want to delete into this section. Even better, use our 'Selecting Multiple Items' feature to easily move multiple files at once (This is covered in our 'Key Functions' section). Then delete this section. This will delete the section and all documents contained within.

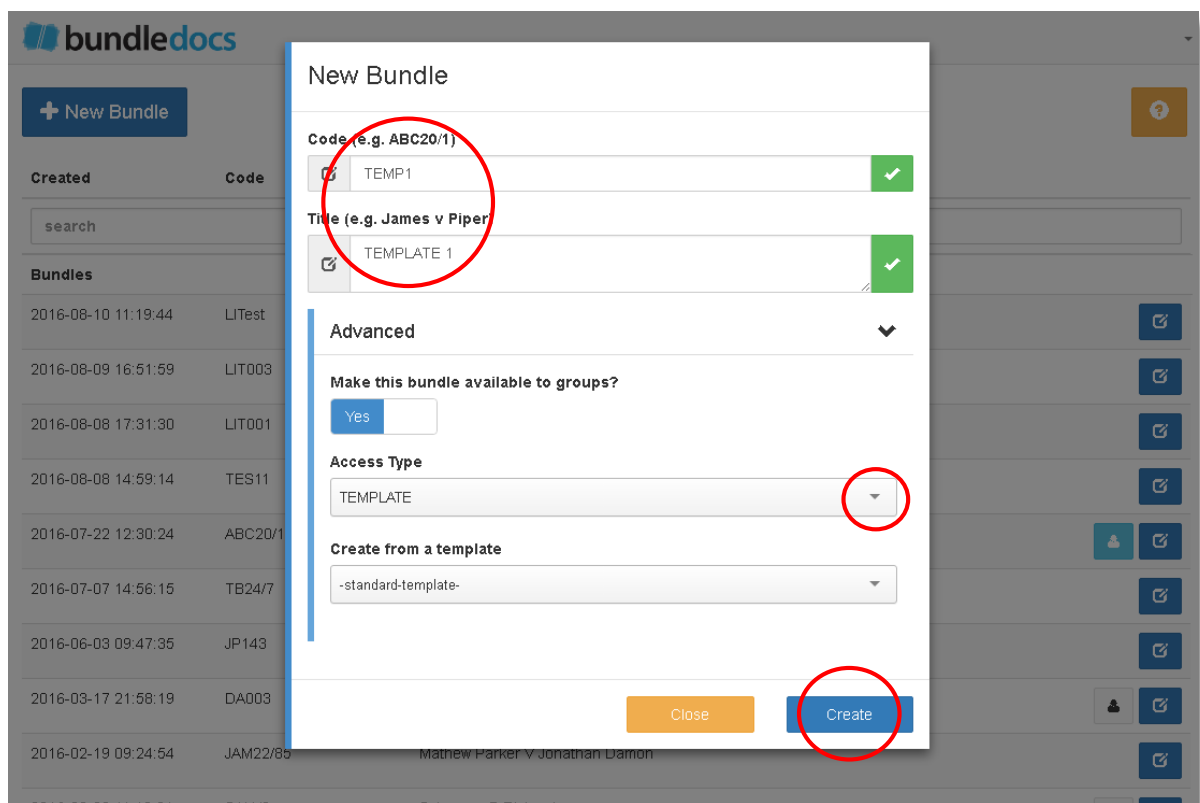
Advanced Features:

Work with Templates:

Create a Template

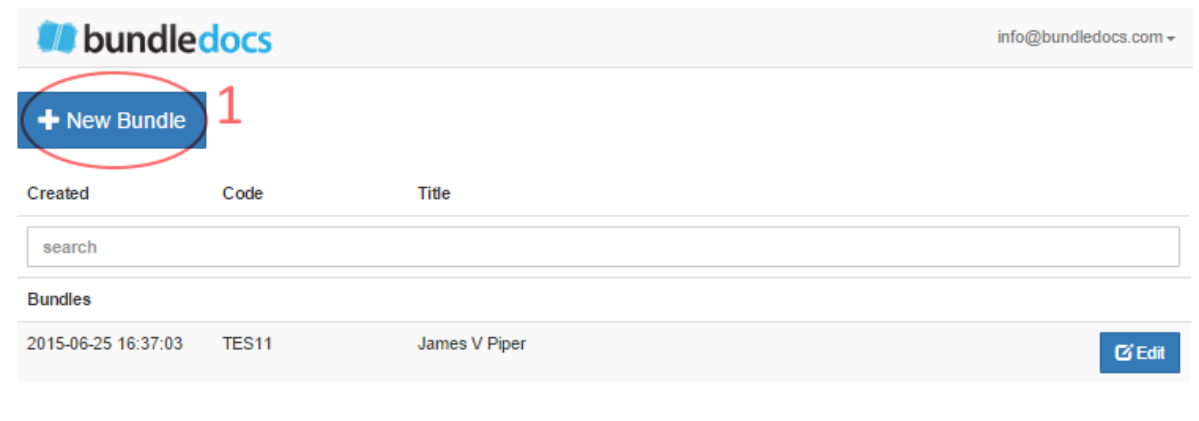


1. Select the 'Create a New Case' button.

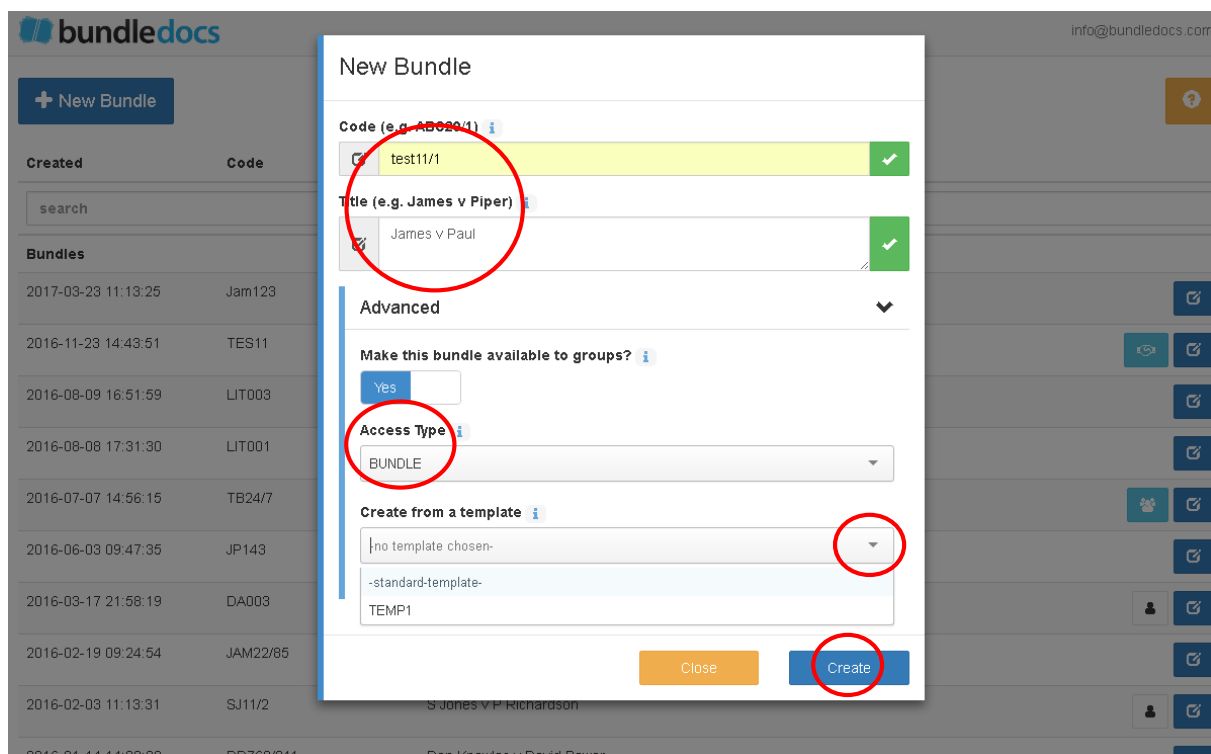


1. Provide a Unique Code (eg. a file reference) and name for your template.
2. Expand the 'Advanced' section. Within the 'Access Type' section, select the dropdown. From the dropdown options, select 'Template'.
3. Select 'Create' to complete.

Create a Bundle from a Template

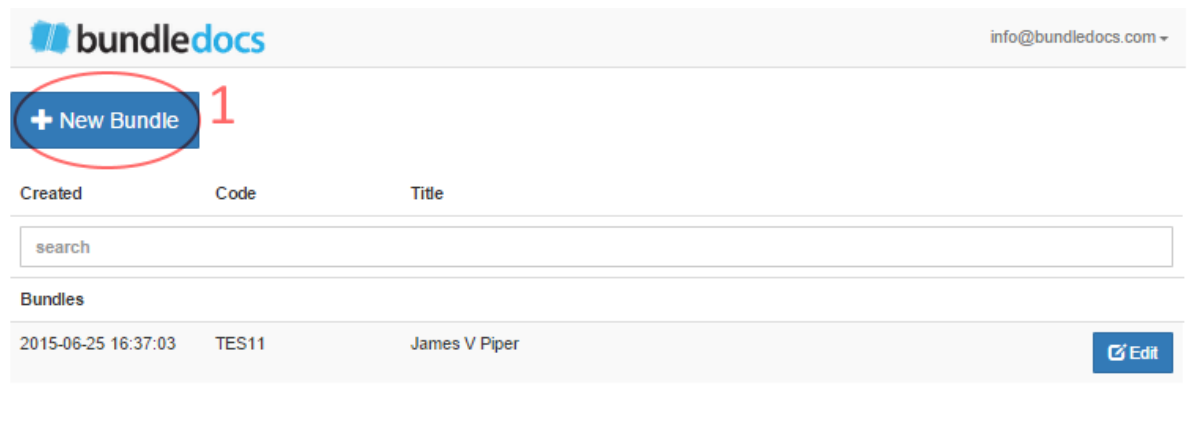


1. Select the 'New Bundle' button.

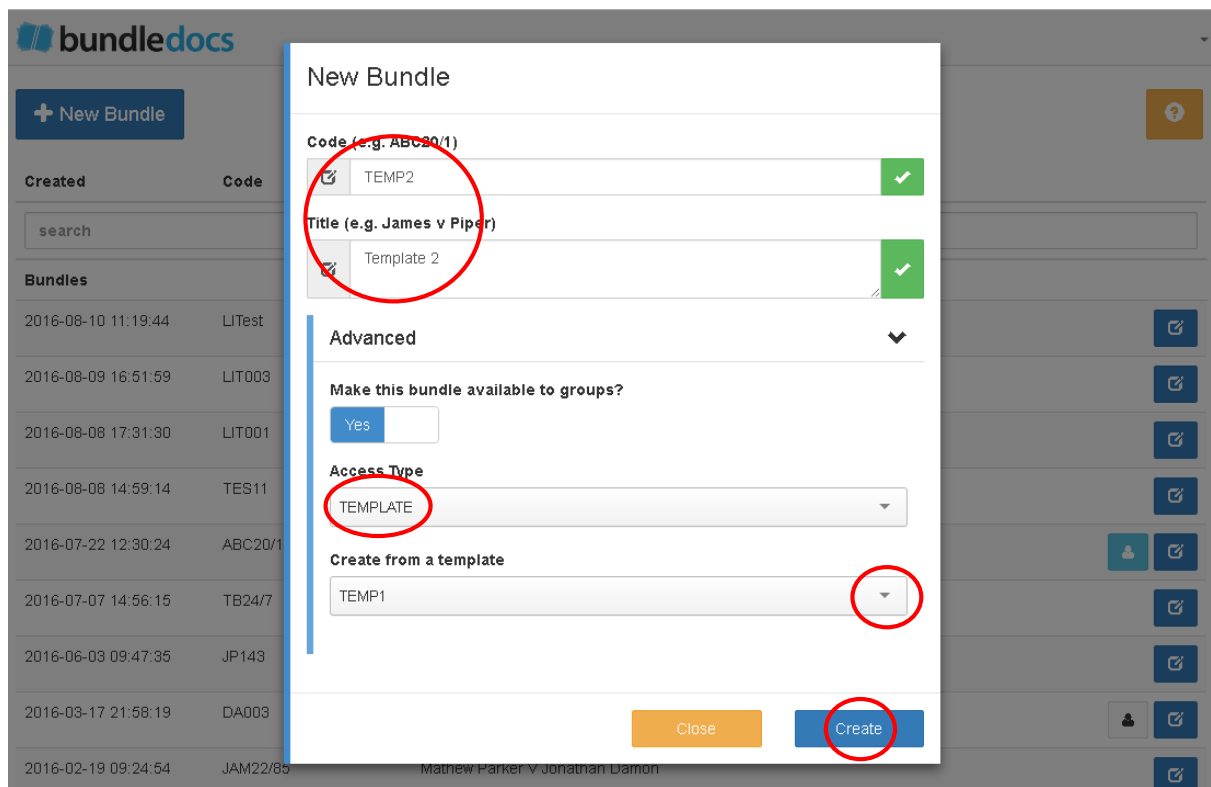


1. Provide a Unique Code (eg. a file reference) and Case Title
Expand the 'Advanced' section.
2. Within the 'Access Type' section, select 'Bundle' from the dropdown.
3. Within the 'Choose Template' section, select the dropdown. Select a template that you would like to base your new case on. For example: 'Template 1'.
4. Select 'Create' to complete.

Create a Template from a Template



1. Select the 'New Bundle' button.



1. You must give your new template a Unique Code and Title.
Expand the 'Advanced' section.
2. Within the 'Access Type' section, select 'Template' from the dropdown.
3. Within the 'Choose Template' section, select the dropdown. Select a template that you would like to base your new case on. For example: 'TEMP1'.
4. Select 'Create' to complete.

Set Default Template

Bundledocs Standard Template

The Bundledocs Standard Template is the default template that is used when new cases are created in Bundledocs. This template creates a single section bundle named 'Default Bundle Section'.



The Bundledocs Standard Template is used by default unless another default template is selected.

In this section we will highlight how to set, change and utilise default templates within Bundledocs.

Set New Default Template

Bundledocs users have the option to set a new default template at any time.



To set a default template, simply select the radio button to the right of your template, as shown above.

Once selected, this template will be used as your default template moving forward. As such all new cases created will utilise this template i.e. when you select 'New Bundle'.

Change Default Template

Bundledocs users have the option to change the selected default template at any time.



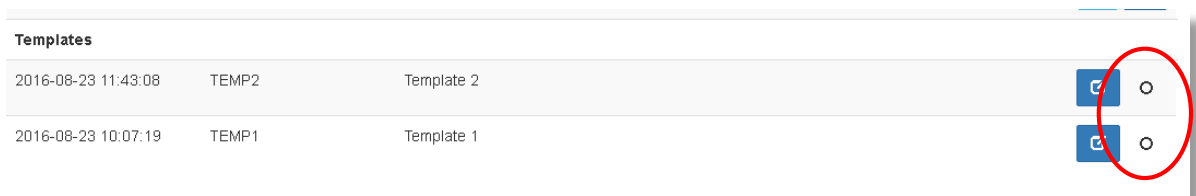
To change the default template, simply select any radio button that appears to the right of your template. The radio button, as shown above, will allow you to see – at a glance – which template is set as your default.

Return to Bundledocs Standard Template

If you have selected a template as your default and would like to return to the Bundledocs Standard template, do the following:



In this example, we have selected 'Template 2' as our default template.



To return to the Bundledocs Standard Template, select the radio button to the right of your current default template i.e. 'Template 2'. Once selected we will be able to see that this template is no longer selected

When no template is selected from your templates list the Bundledocs Standard Template will be used.

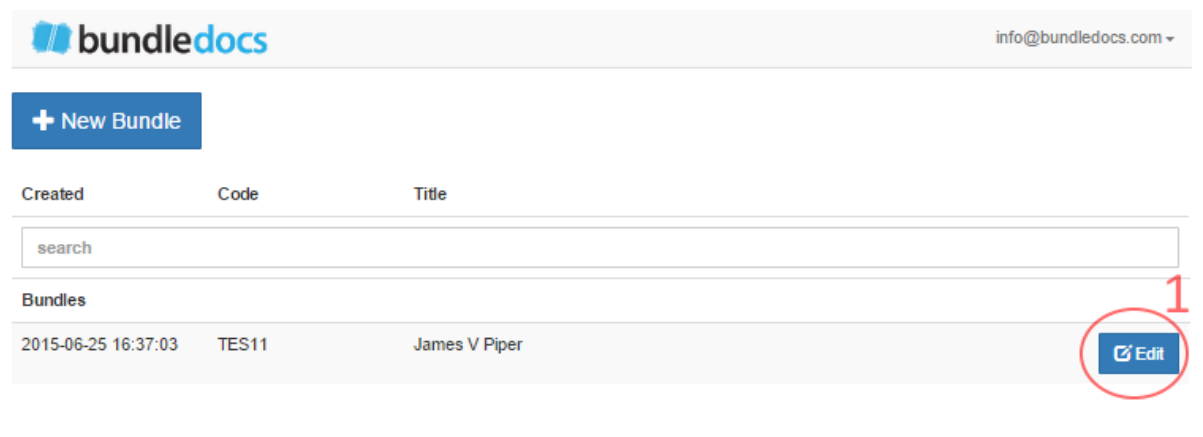
Work with Document Dates:

Bundledocs provides you with the ability to include document dates in your completed index. Even better, you have the flexibility to choose to include/exclude when generating your bundle.

Please Note: It is important to set your required date format when you create your bundle. Although it is possible to change the date, this will not affect any documents that have been uploaded previously. Instead, only documents uploaded from this point forward will have the new date format.

Within Bundledocs it is possible to change the date format at document level or change the default date format for your account within 'Account Settings'. Within this section we will take a look at how this can be done...

View document date (on screen)



1. Select the 'Edit Details' button.

Update Bundle

Code (e.g. ABC20/1) ⓘ

✎

TES11

✓

Title (e.g. James v Piper) ⓘ

✎

James V Piper

✓

Advanced ▼

Access Type ⓘ

BUNDLE ▼

Make this bundle available to groups? ⓘ

Yes

Show Document Date on Screen? ⓘ

Yes

Default Date Format ⓘ

dd-MM-yyyy16-05-2017

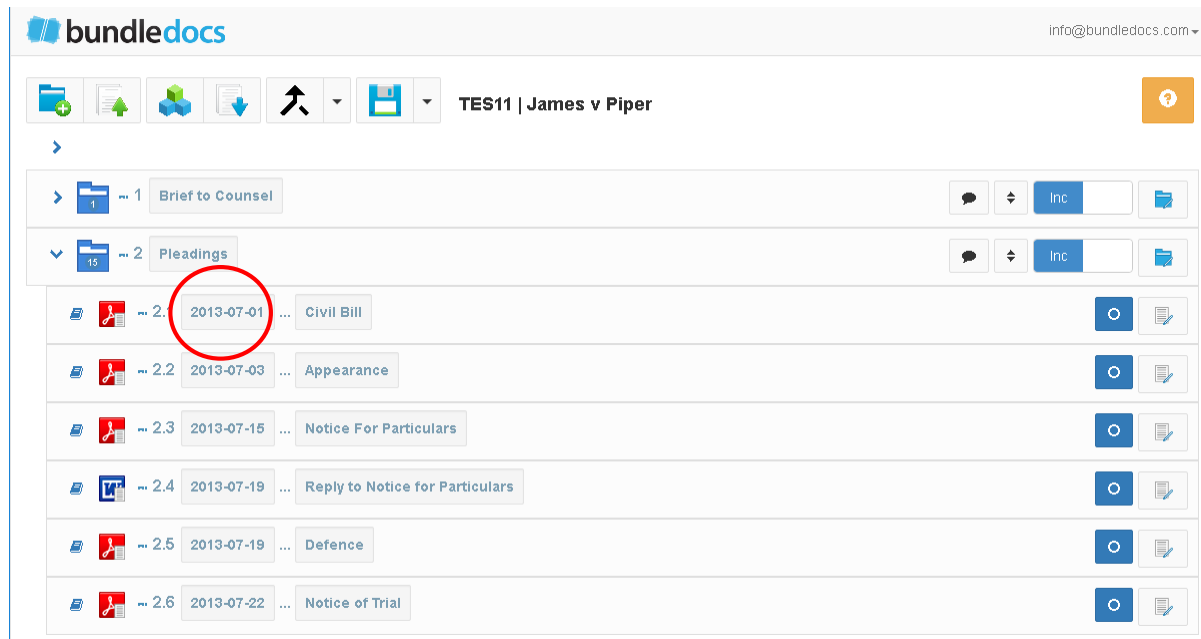
Collaborators >

Migrate >

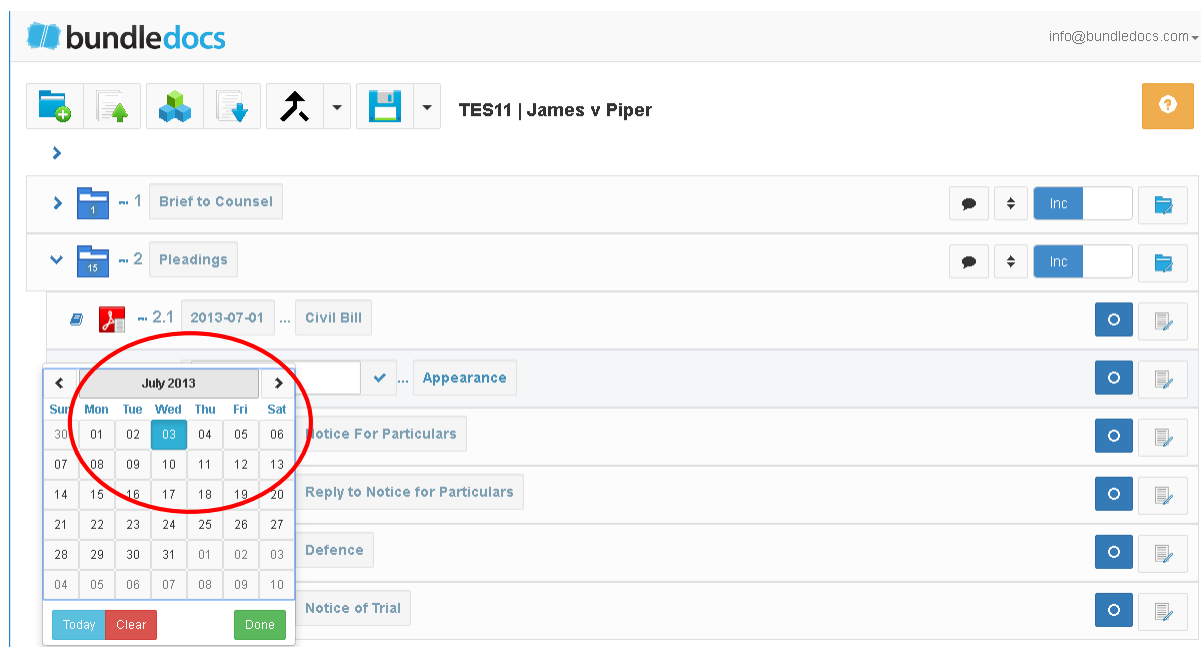
DeleteCopyOpenCloseUpdate

1. Expand the 'Advanced' area
Select 'Show Document Date on Screen'.
2. Adjust the Default Display Date Format if required.
Top Tip: If this date format is not the version you use most often, you can change this to default to your required version. We will cover this in the sections to follow.
3. Select Update to complete

Once the 'Show Document Date on Screen' option is selected, the following should appear within your bundle.

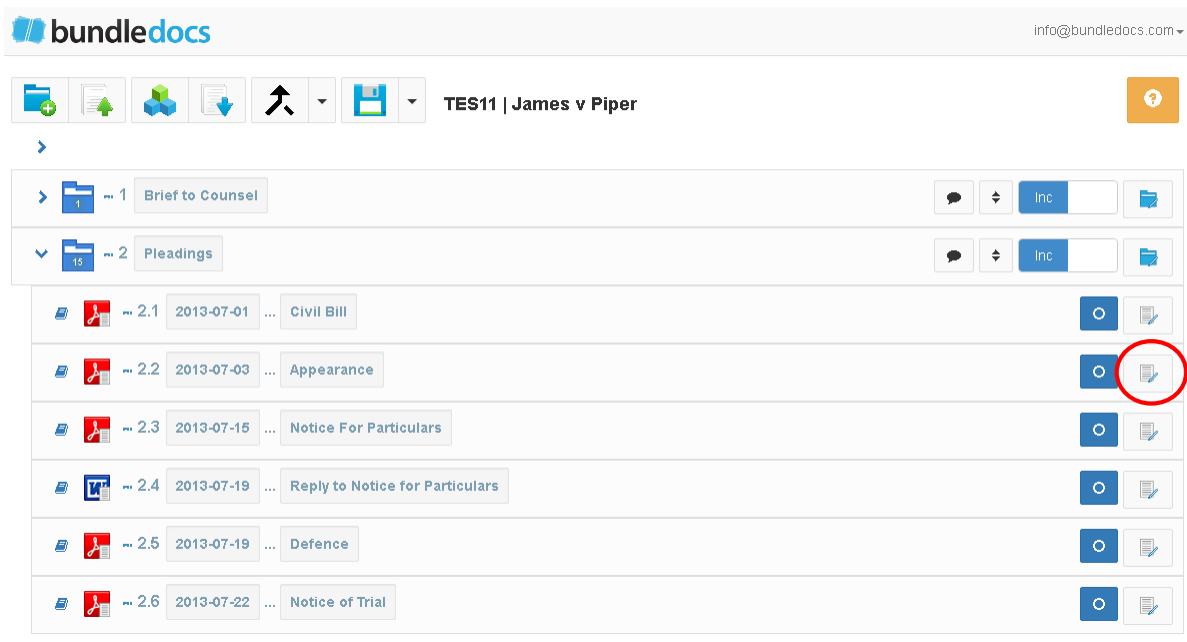


Amend document date

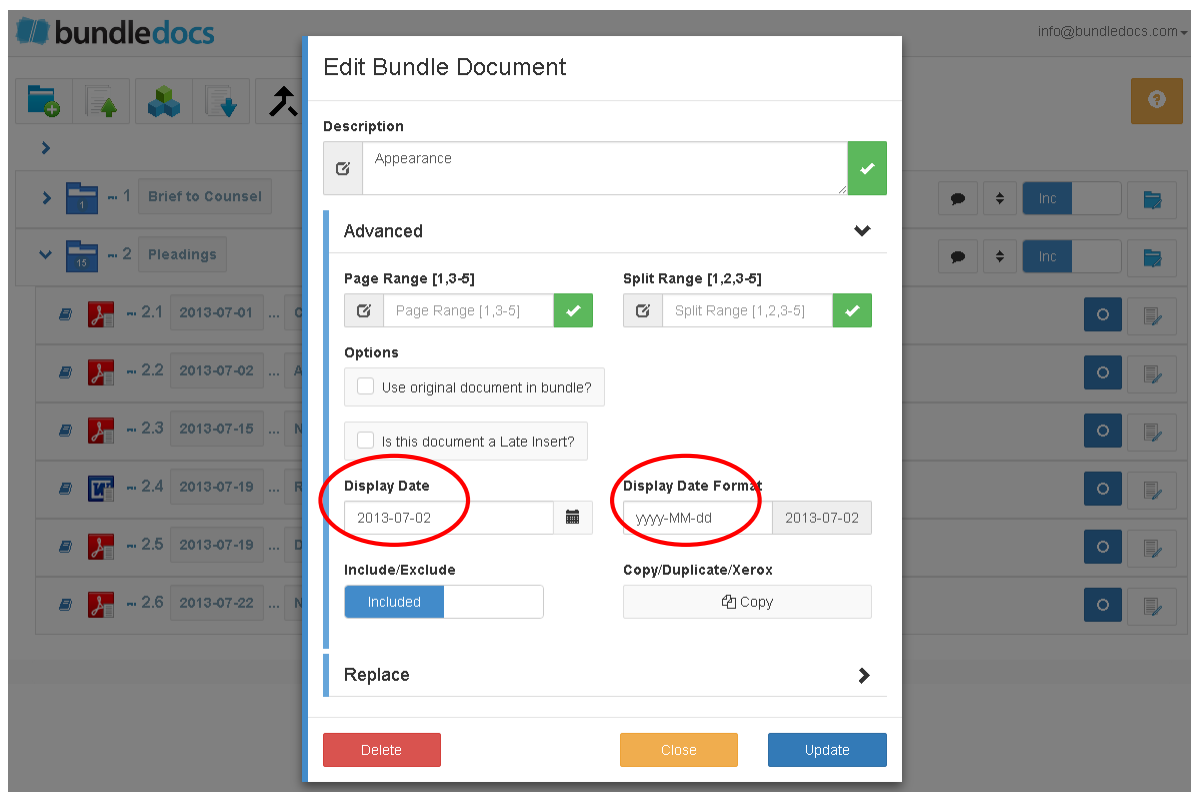


1. Quickly amend the document date by selecting the date on screen. Once selected, a calendar will appear. Once you have selected the correct date, select 'Done'.

Alternatively, this can be done within the 'Edit Details' area...

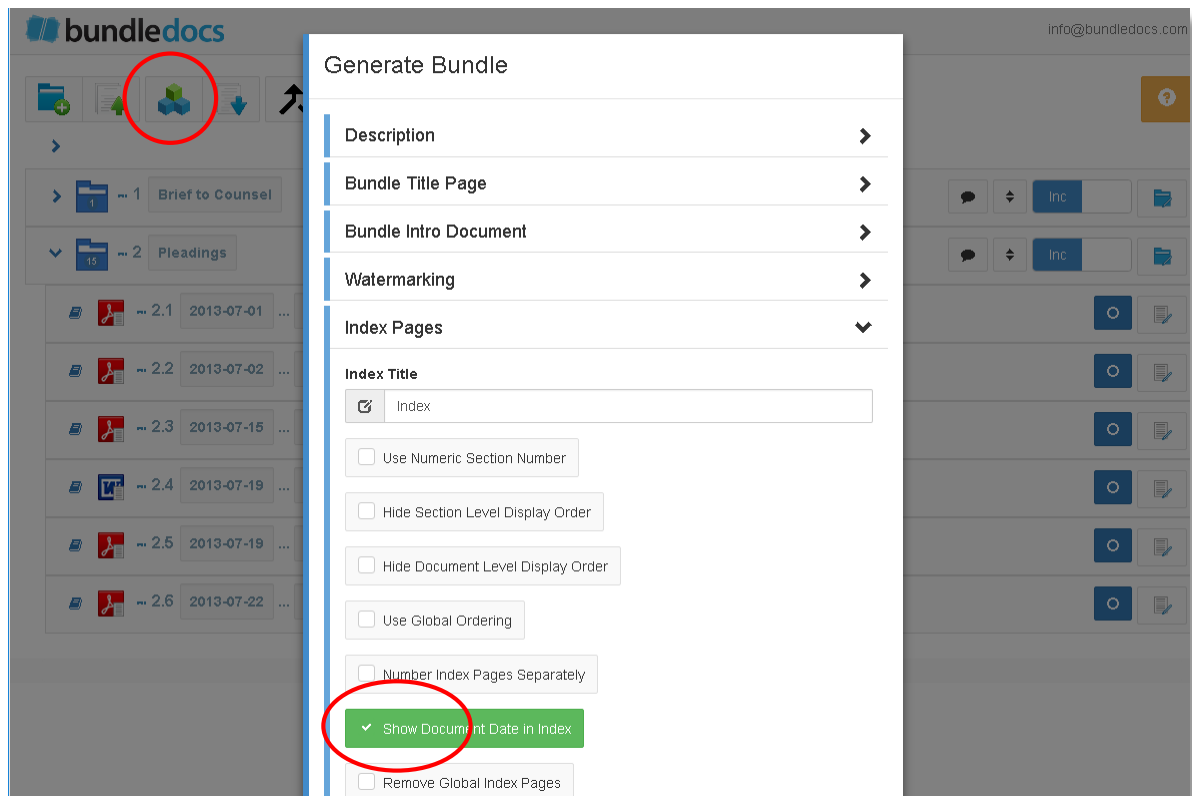


1. Select the 'Edit Details' option. This is located to the right of each document within Bundledocs.



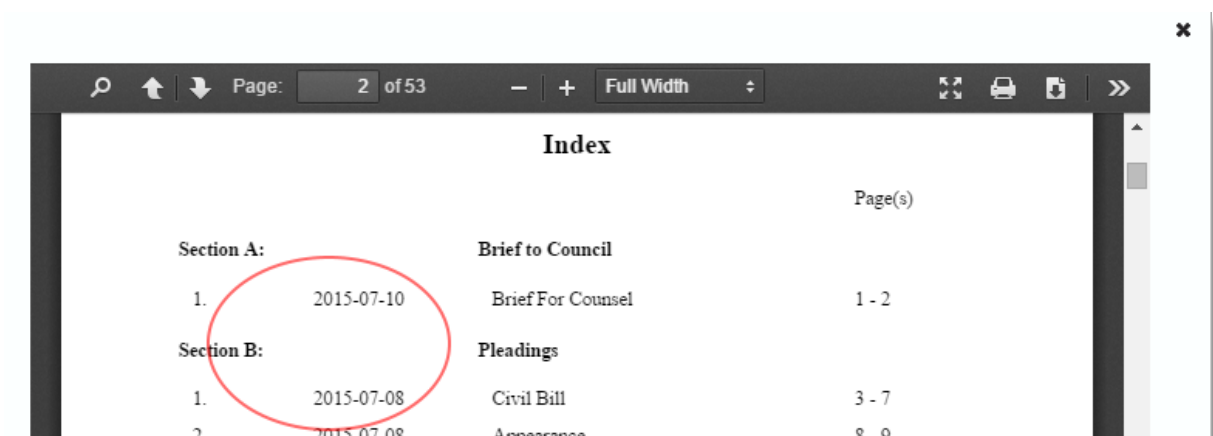
1. Expand the Advanced section. Click the date to launch the date picker or clear the selection and type a new date in the field provided.
2. Select 'Update' to complete.

Include document date in bundle



1. Select 'Generate' and expand the 'Index Pages' section.
2. Select the 'Show Document Date on Index Pages' to include the dates within the index of you completed bundle.
3. Select 'Generate' to complete.

Once the generation stage is complete, your bundle is immediately available. The document date will then appear within your index page, as shown below.



Change default date format

The screenshot shows the 'bundledocs' interface. At the top right, the email 'info@bundledocs.com' is displayed with a dropdown menu. The dropdown menu is open, showing options: 'Home', 'Account Settings' (circled in red), 'Upgrade & Billing', 'Groups & Sharing', 'Manual', and 'Logout'. Below the header, the 'Account Settings' section is active. Under the 'Bundle Defaults' tab, the 'Misc.' sub-tab is selected. The 'Display Date Format' field is highlighted with a red circle, showing the current format '2016-08-18' and the input field containing 'yyyy-MM-dd'. Other fields include 'Index Title Text' with a value of 'Index' and a 'Use Source File Dimensions Where Possible?' toggle set to 'No'.

1. Select your email in the top right corner. From the dropdown select 'Account Settings'.
2. Within the 'Bundle Defaults' section, you have the ability to change the default display date format for any document uploaded by inserting an alternative date format within the field provided.

Please note: Changing the Default Display Date at this point, will not affect any documents currently uploaded. Instead, only documents uploaded from this point forward will have this date format. Once documents have been uploaded, the date format can only be changed at document level.

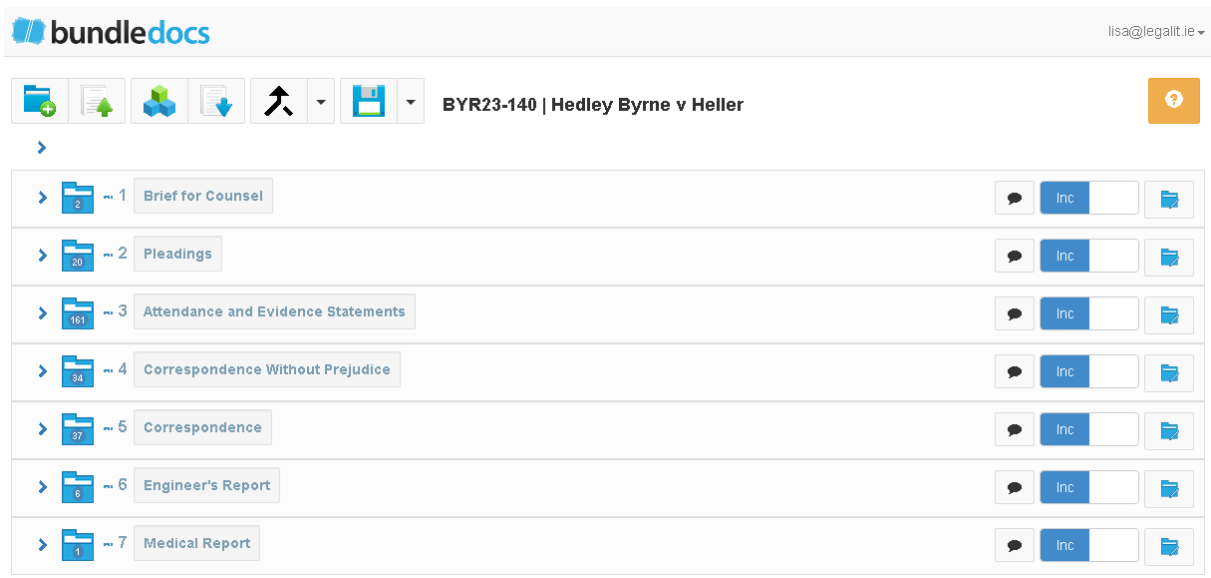
1. Select 'Update' at the bottom of the page to save changes.

Work with Volumes

Bundles can range in size and contain hundreds – if not thousands – of pages. Working with bundles of any size can be time consuming and laborious... That's where Bundledocs comes in. Bundledocs takes the hard work out of producing bundles. It automatically creates for you a complete indexed, numbered, ordered, bookmarked and hyperlinked PDF bundle in minutes. But that's not it. With Bundledocs, bundles (of any size) can be securely shared electronically, saved or even printed.

In most cases, when printing large volumes it is often necessary to split the contents of your bundle into separate volumes. Each volume can then be bound within a separate lever arch binder or ring binder. Depending on the type of bundle you are preparing you may need to create new volumes every 100, 120, 250, 300 pages etc. What's great about Bundledocs is you have full control and can produce volumes of any size.

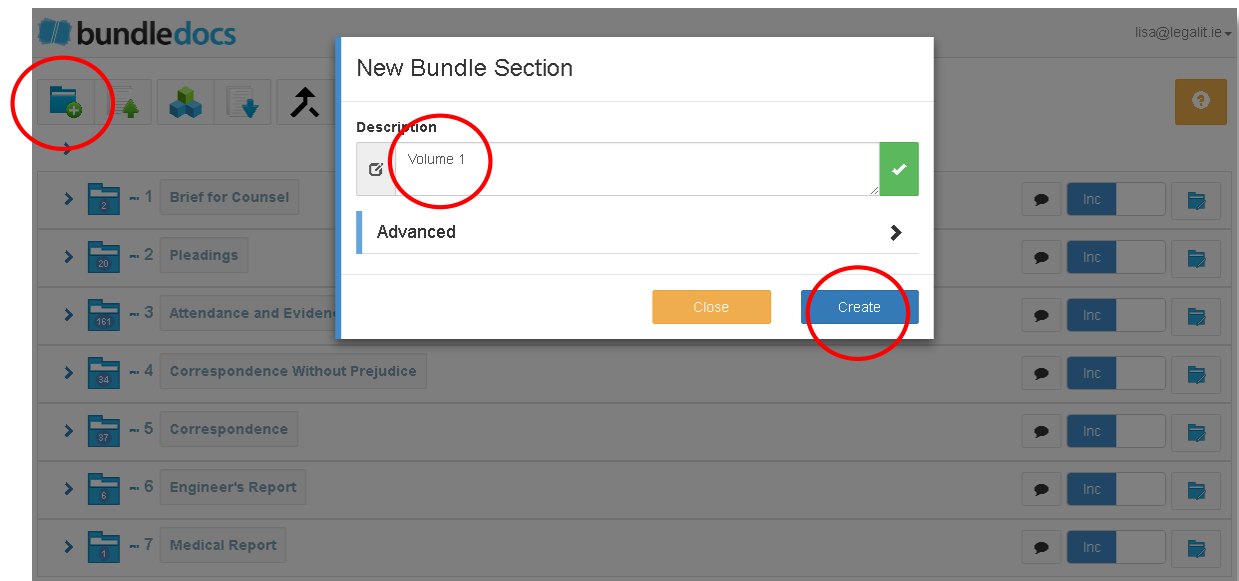
Follow these steps and find out how to utilise volumes in Bundledocs.



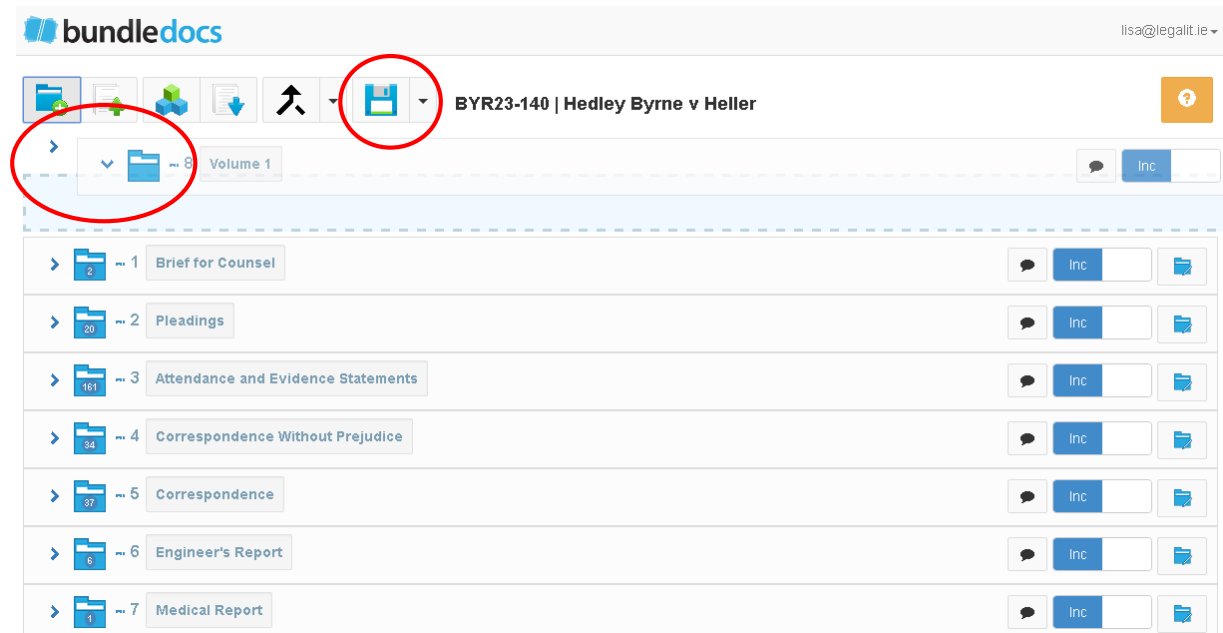
Begin by creating your bundle in Bundledocs. In our example, we have created a number of sections, uploaded the relevant document and arranged them in the correct order.

Now we have created our bundle, we are ready to work with Volumes. Let's begin...

Create a Volume



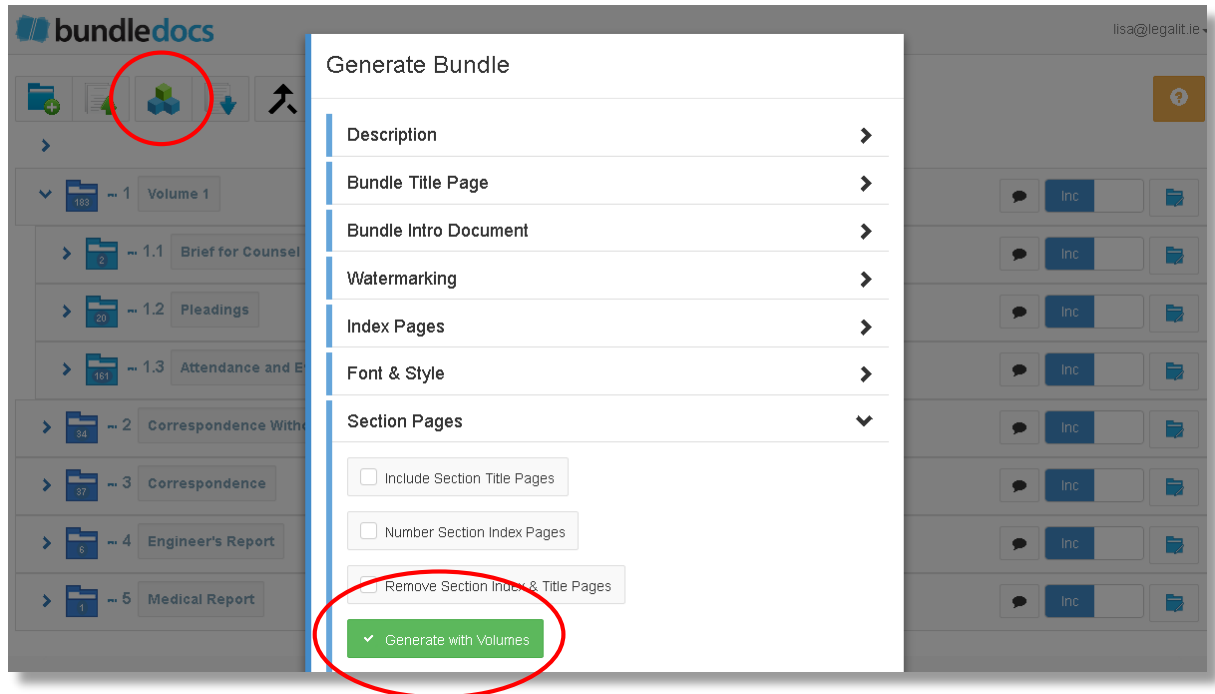
1. Create your first volume by selecting the 'Create a Section' button, as highlighted above.
2. Provide a name for your volume. For example: 'Volume 1'
3. Select 'Create'.



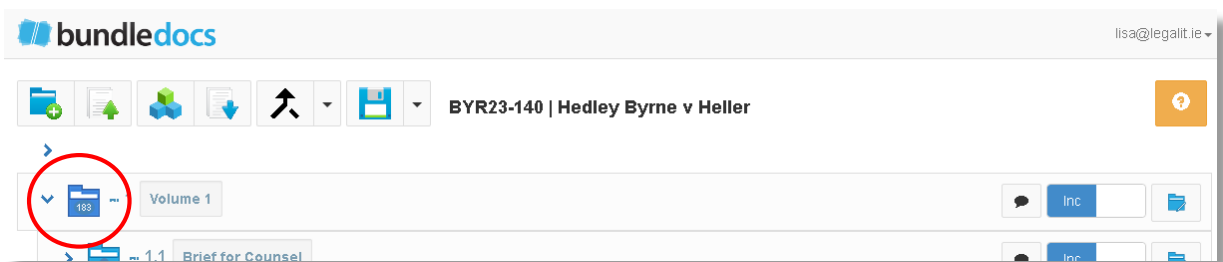
1. Move the newly created volume to the top by simply dragging and dropping.
Note: Select the 'Folder' icon to move.
2. Press Save to update the numbering

Make Volumes Visible

When working with volumes it is helpful to see – at a glance – which folders are volumes and which are sections. Let's take a look at how this can be done...



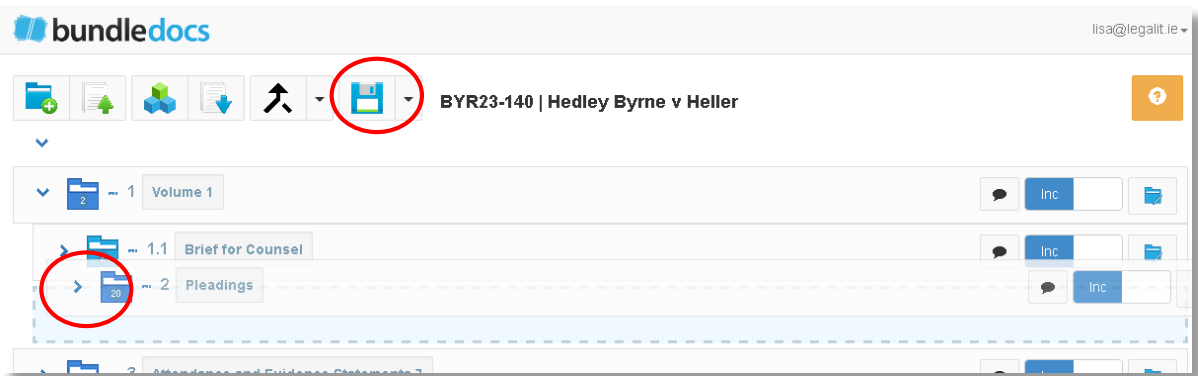
1. Select 'Generate'
2. Within the 'Section Pages' section, select the option 'Generate with Volumes'
3. Once selected, simply click outside the 'Generate Bundle' window (into the grey area) to return to your bundle.



1. Once selected, all volumes (folders at level 1) will now appear in dark blue.

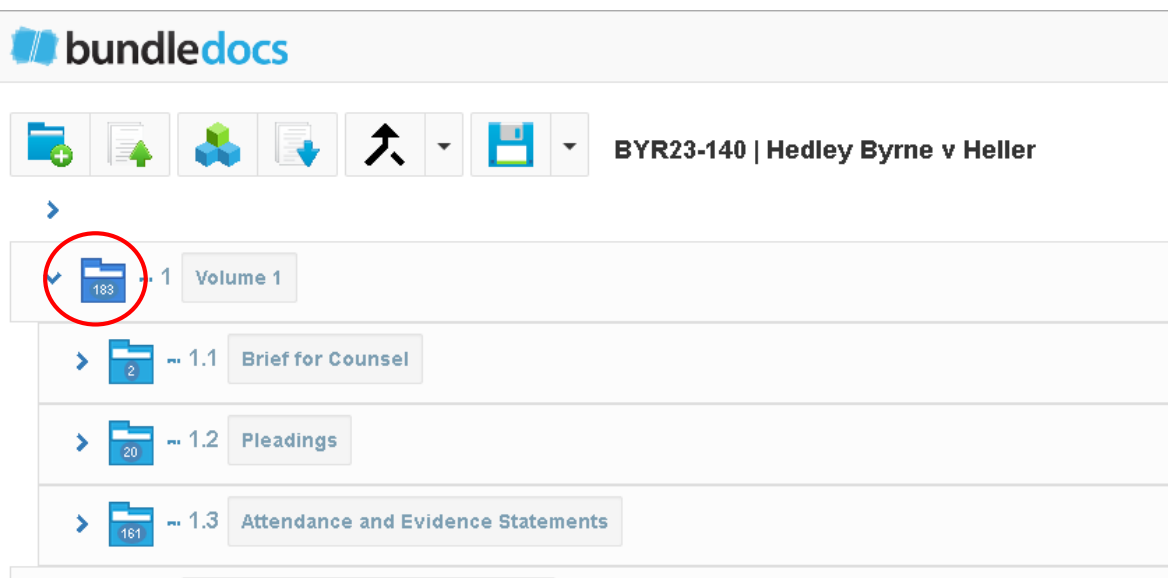
Add Sections to Volume

Next we will start to move our sections into our newly created volume.



1. Select your section and move to into our newly created volume.
2. Once moved, select 'Save' to update. This will change the section colour from Dark Blue (i.e. it's a volume) to Light Blue (i.e. it's a section)

Identify Number of Pages in Each Volume



1. Simply take a look at the folder, located to the left of any volume or section. Within each folder icon you will be able to see, at a glance, how many pages are currently contained within each volume and each section.

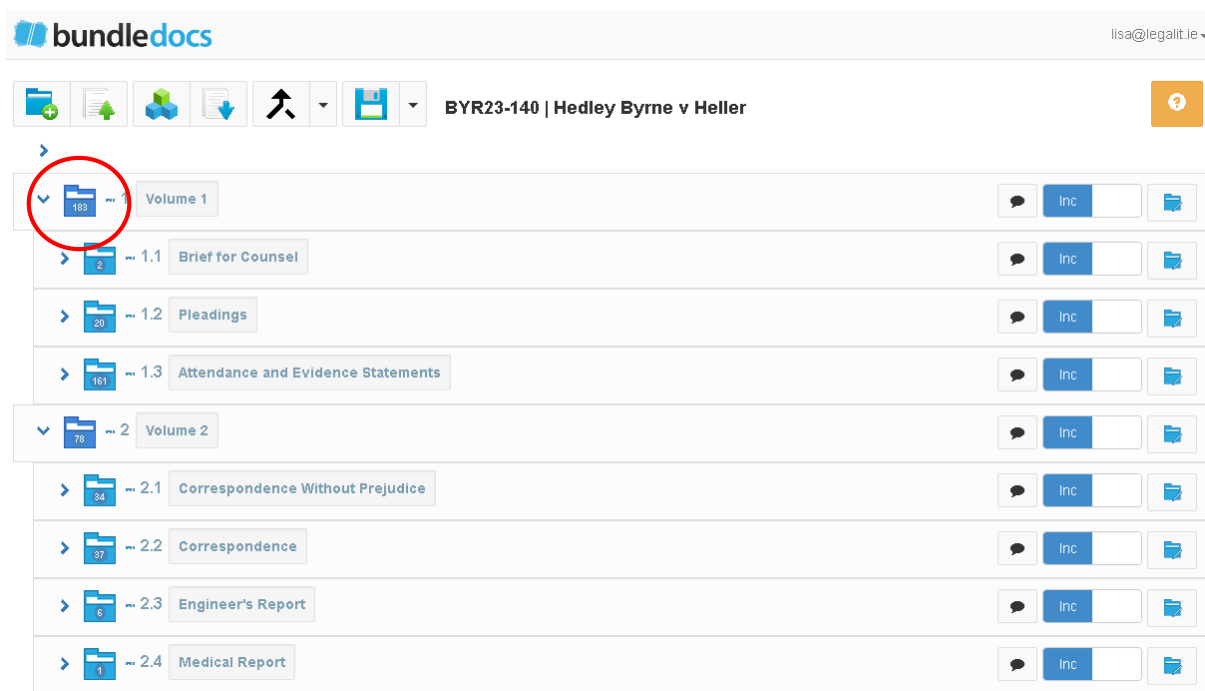
This is very useful when creating volumes. For many users creating a volume bundle, they need to comply with specific rules regarding the number of pages allowed per volume. In the example above, we can see that there are currently 183 pages contained within 'Volume 1'. We can also see how many pages are contained within each section.

Note: This will automatically update as you add/remove document and sections.

Create a Continuation Section

Depending on the type of bundle you are preparing you may need to create new volumes every 100, 120, 250, 300 pages etc. What's great about Bundledocs is you have full control and can produce volumes of any size.

When working with bundles, it is common that the volume limit occurs in the middle of a section. When this occurs, the remaining documents and sections will need to be moved into the next volume. This is where our 'Continuation' feature comes in. Let's take a closer look...

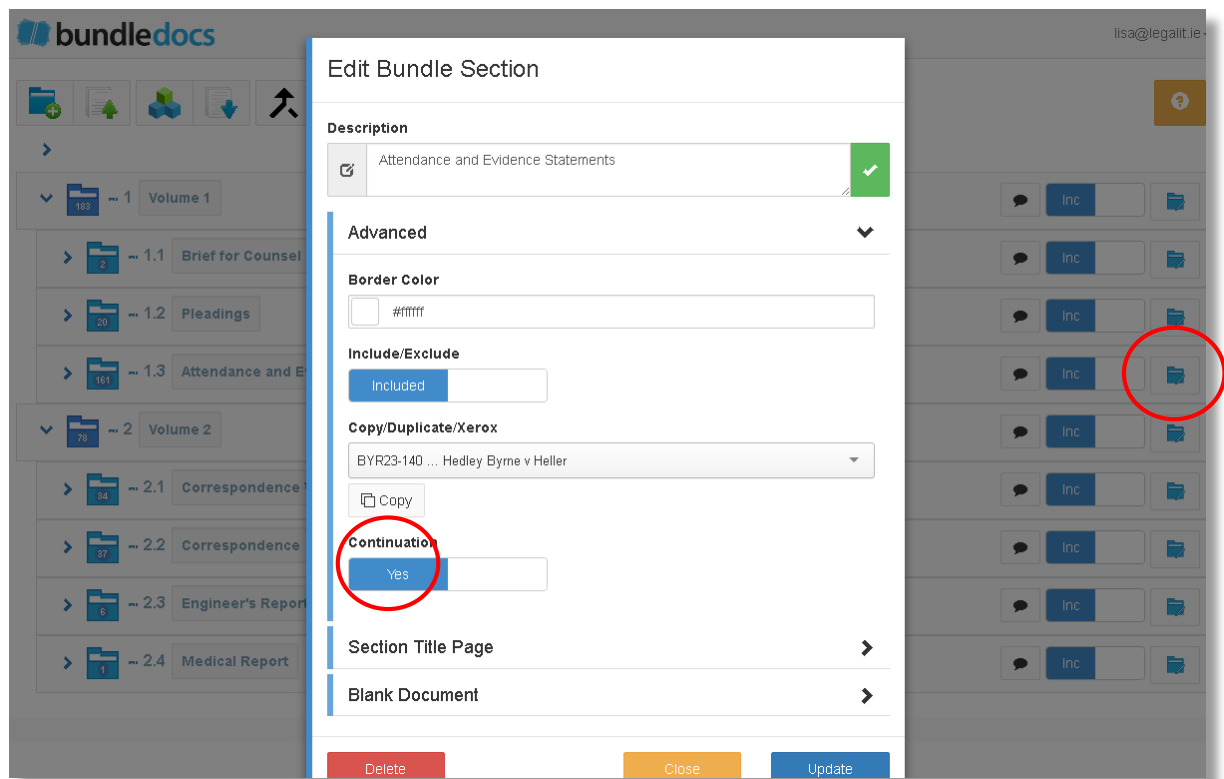


In order to illustrate how the Continuation feature works within Bundledocs, we will take the instance that all our volumes will need to have a maximum of 120 pages (per volume). From the above sample, we can see that we currently have 183 pages within 'Volume 1'.

As we now have too many pages within our first Volume, we will need to do the following...

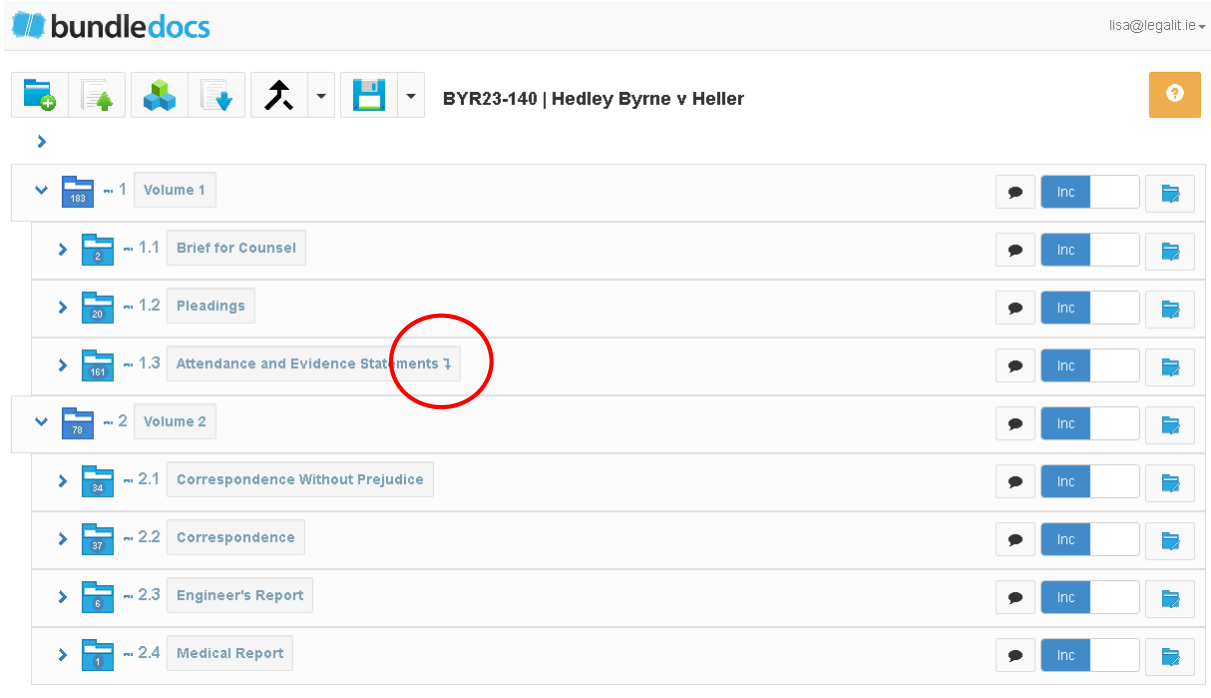
Choose Continuation

First we will need to identify that we would like to continue the numbering i.e. create a continuation section.

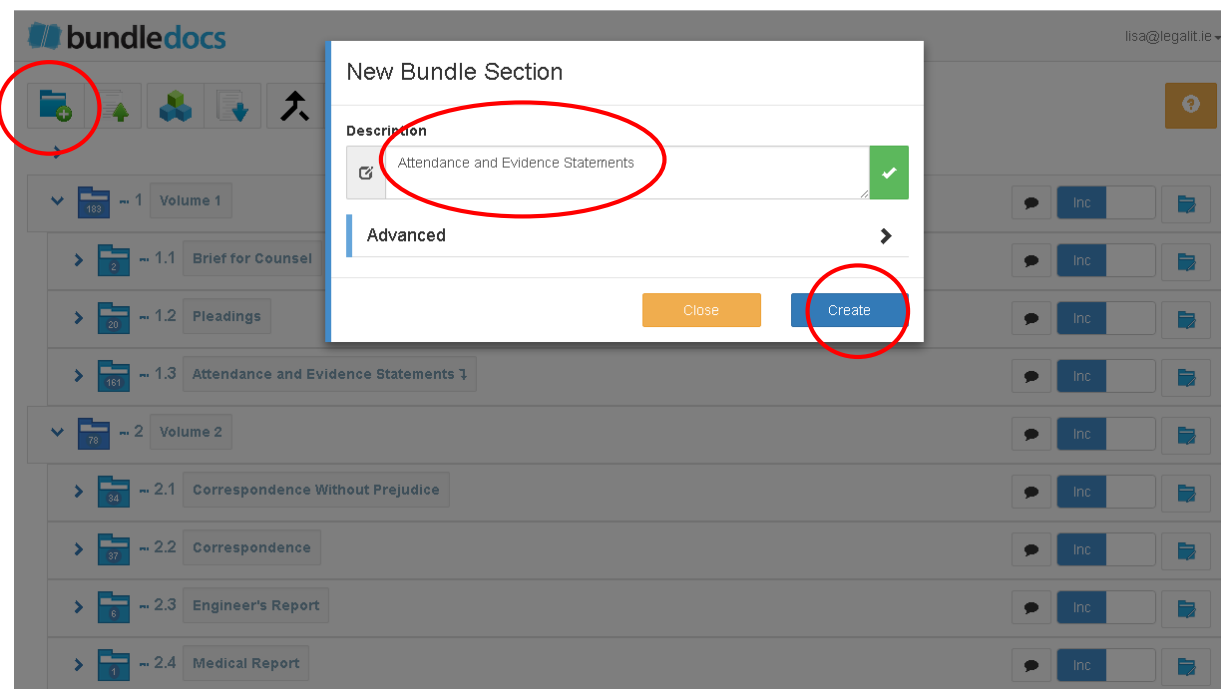


1. Select the 'Edit Details' button. A window will appear.
Expand the 'Advanced' section
2. Select the 'Continuation' button and ensure it is set to 'Yes'. (Yes, this is a continuation section)
Press 'Update' to complete.

Once you have selected a section as 'Continuation' a down arrow will appear to the right of the text, as shown below. This will allow you to see at a glance which sections are continuation sections.

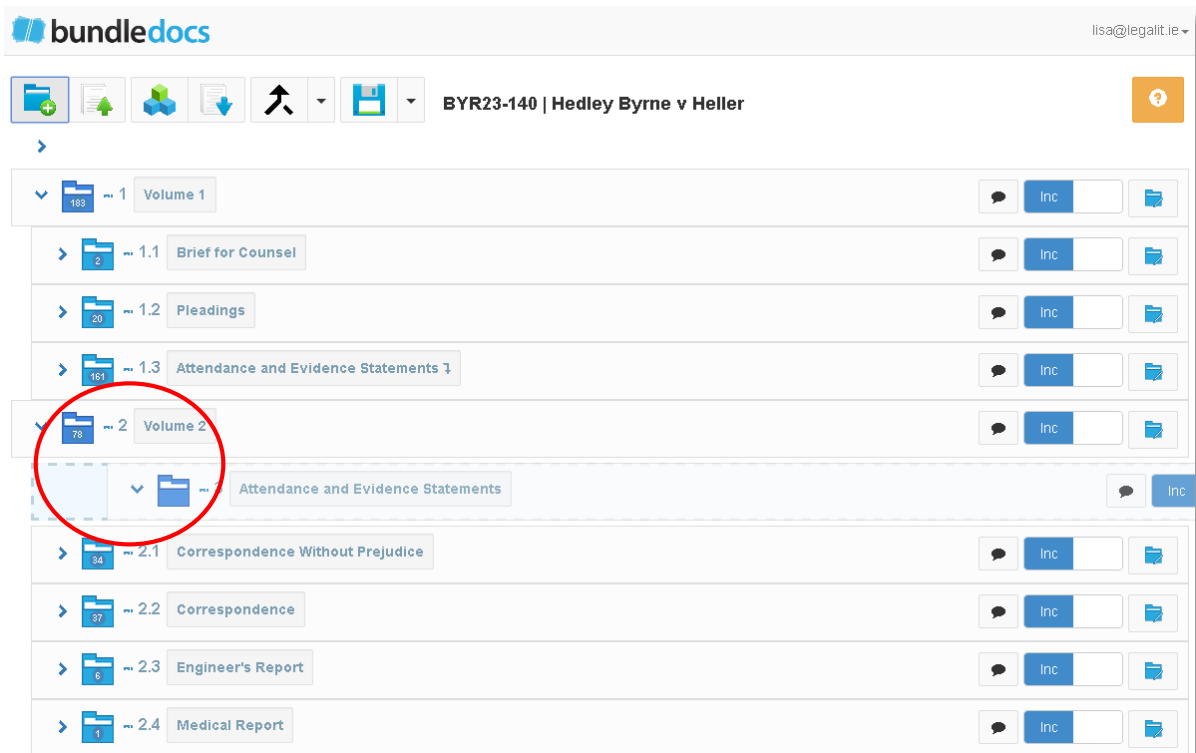


Create another section



1. Next, we will need to create another section for our continuation section. Select the 'Create Section' button. A window will appear.
2. Create the new section using the same name as our section above. For example: 'Attendance and Evidence Statements'.
3. Select 'Create' to complete.

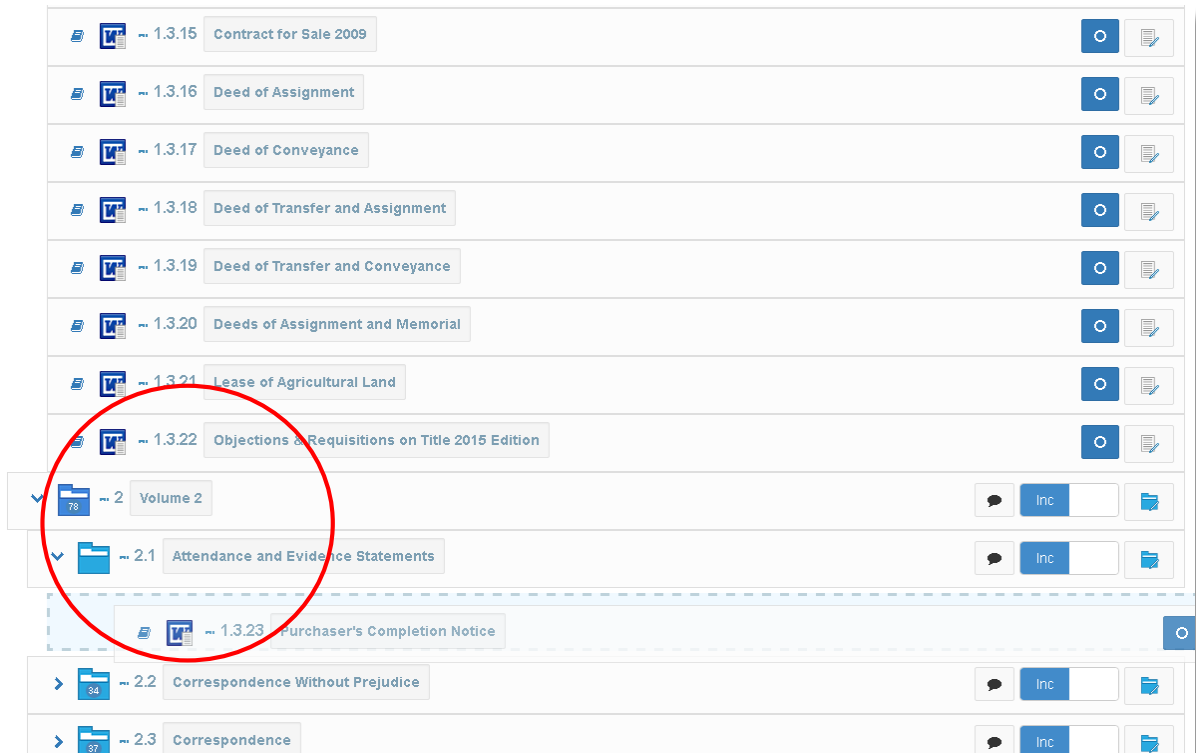
Move Section into Place



1. Once you have created your new section, move to the beginning of the next volume. In our case we will move the new section 'Attendance and Evidence Statements' to the beginning of 'Volume 2'.
2. Select 'Save' to update the numbering and save our new changes.

Move files into Place

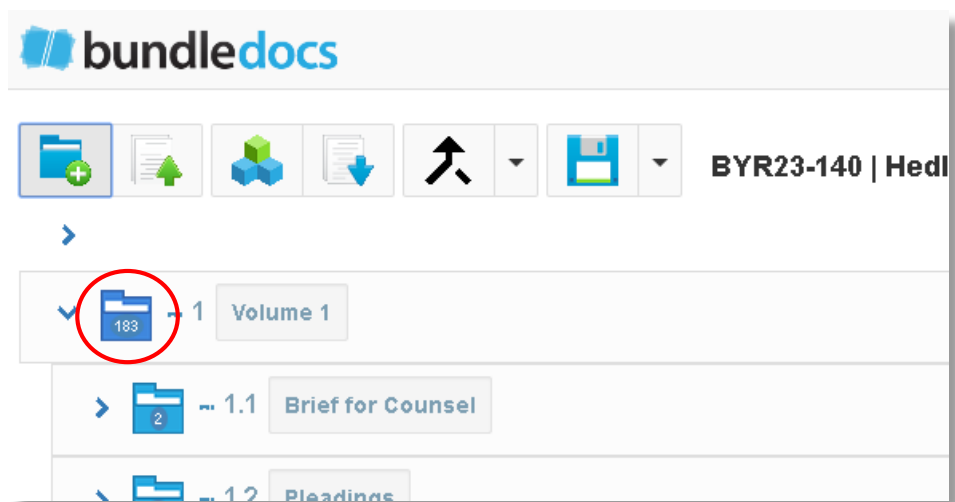
Next we will move files from Volume 1 to Volume 2 – or from our continuation section to our newly created section.



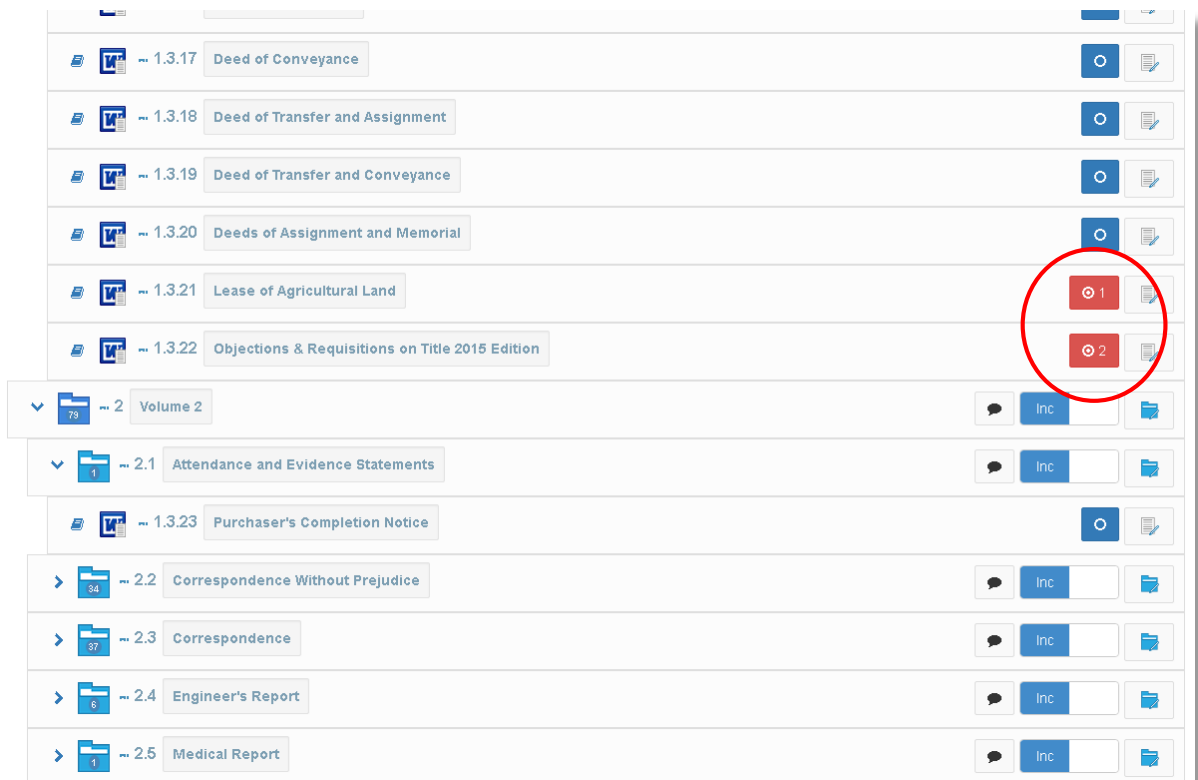
1. Move files from Continuation Section to New Section

Note: Whilst moving the files we will keep checking the number of pages in the previous volume i.e. Volume 1. We will continue to move files until we have reached our page limit per volume.

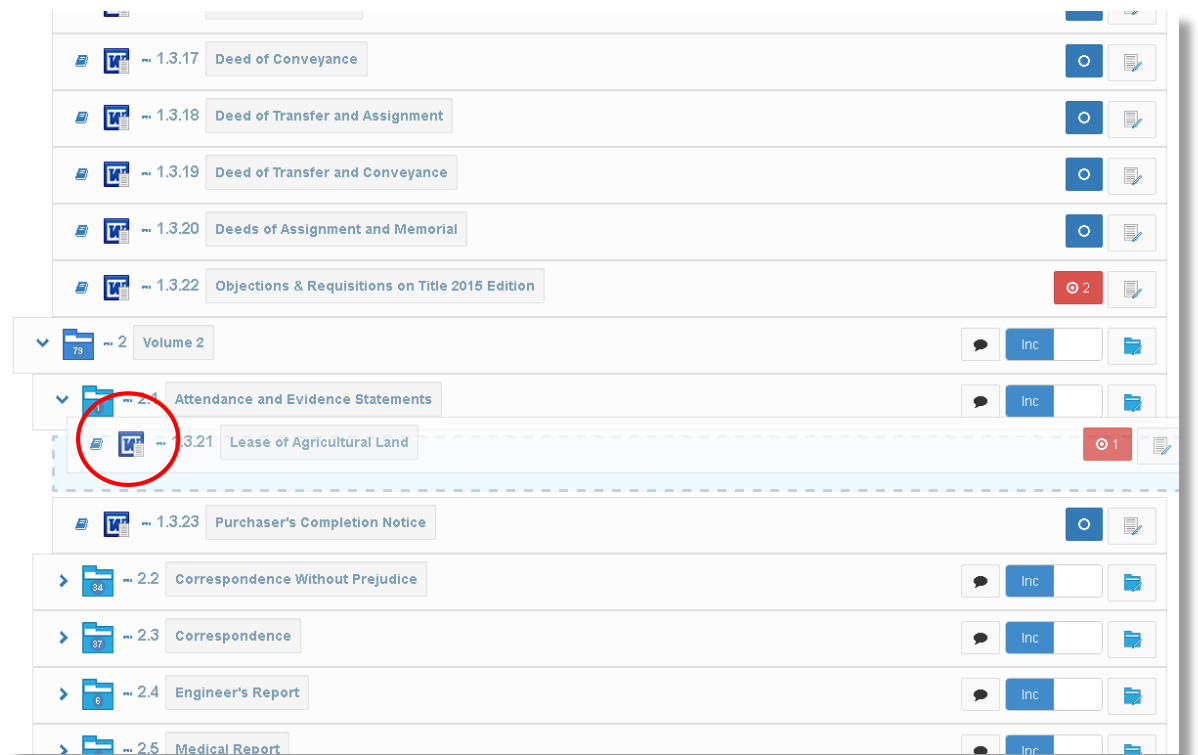
In our example we will continue to move files from Volume 1 into Volume 2 until we have reduced our page count to 120 pages.



Move multiple files into Place

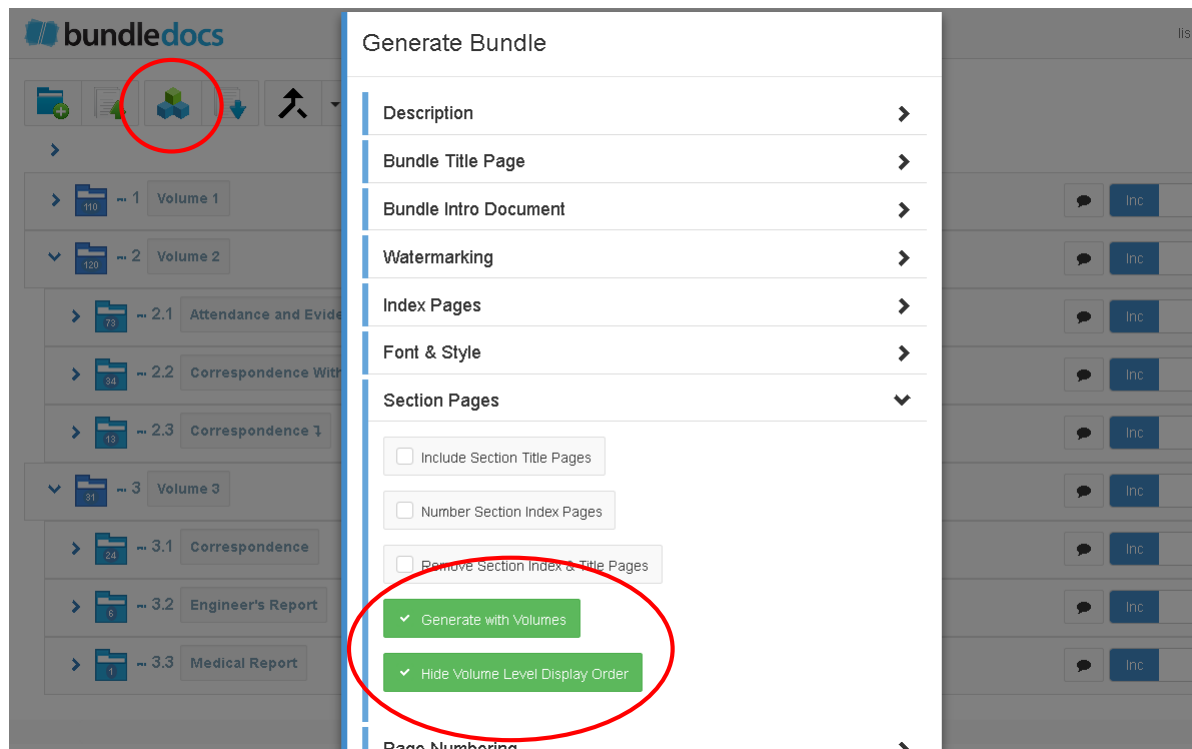


1. Select multiple files to move a number of files at once, as shown above.



1. Select the file type icon to drag and drop files into place.

Generate Bundle



1. Repeat these steps until you have created the required volumes.
When you are ready to compile your bundle, select the 'Generate' button.
2. Apply any customisations you require. Within the 'Section Pages' section, we will ensure the 'Generate with Volumes' and 'Hide Volume Level Display Order' options are selected.

Complete Bundle

Index		Page(s)
Volume 1		
Section A: Brief for Counsel		
1.	Brief For Counsel	1 - 2
Section B: Pleadings		
1.	Civil Bill	3 - 7
2.	Entry of Appearance	8 - 9
3.	Entry of Appearance	10 - 11
4.	Reply to Notice for Particulars	12 - 13
5.	Reply to Notice for Particulars	14 - 15
6.	Defence	16 - 17
7.	Notice For Particulars	18 - 20
8.	List of Special Damages	21
9.	Notice of Trial	22
Section C: Attendance and Evidence Statements		
1.	Attendance 19-06-2000	23
2.	Attendance 20-12-2000	24
3.	Attendance 16-08-2000	25
4.	Attendance 14-04-2000	26

1. Once generated, we can see that our bundle is split into volumes and sections.

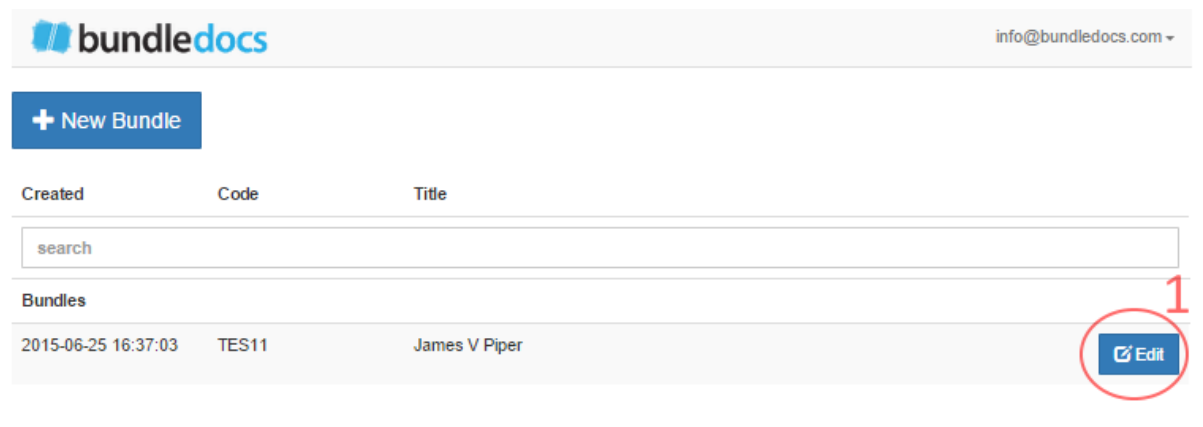
17.	Deed of Conveyance	91 - 93
18.	Deed of Transfer and Assignment	94 - 97
19.	Deed of Transfer and Conveyance	98 - 102
20.	Deeds of Assignment and Memorial	103 - 110
Volume 2		
Section C: Attendance and Evidence Statements (cont.)		
21.	Lease of Agricultural Land	111 - 131
22.	Objections & Requisitions on Title 2015 Edition	132 - 182
23.	Purchaser's Completion Notice	183
Section D: Correspondence Without Prejudice		
1.	Letter to Allianz Insurance 03-05-2000 WP	184
2.	Letter From Keenan 15-02-2003 WP	185
3.	Letter to Fletcher Keenan Solicitors 27-08-2002 WP	186
4.	Letter to Allianz Insurance 26-05-2000 WP	187
5.	Letter From Keenan 01-09-2003 WP	188
6.	Letter From Keenan 13-01-2004 WP	189
7.	Letter to Michael James 04-09-2004 WP	190
8.	Letter to Michael James 15-09-2004 WP	191
9.	Ltr to Bank Chasing Mortgage Pack	192

1. In Volume 2, we chose to continue the 'Attendances and Statements' section. By previously specifying that this is a "continuation" section, we can see that Bundledocs has automatically continued the numbering scheme into the next volume (volume 2).
2. In addition, Bundledocs automatically inserted the text "(cont.)" next to the section title.

Get to Know Your Bundledocs Account:

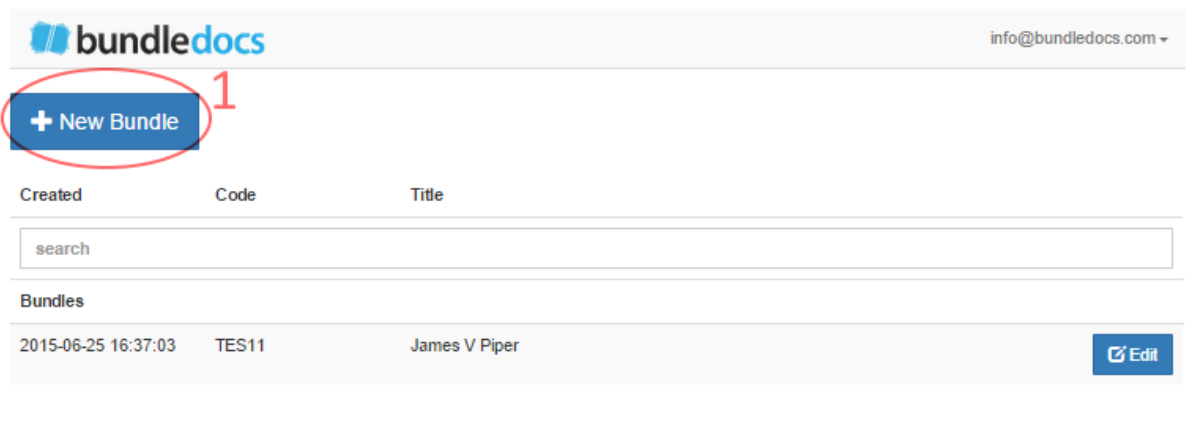
Home Page:

Edit bundle details



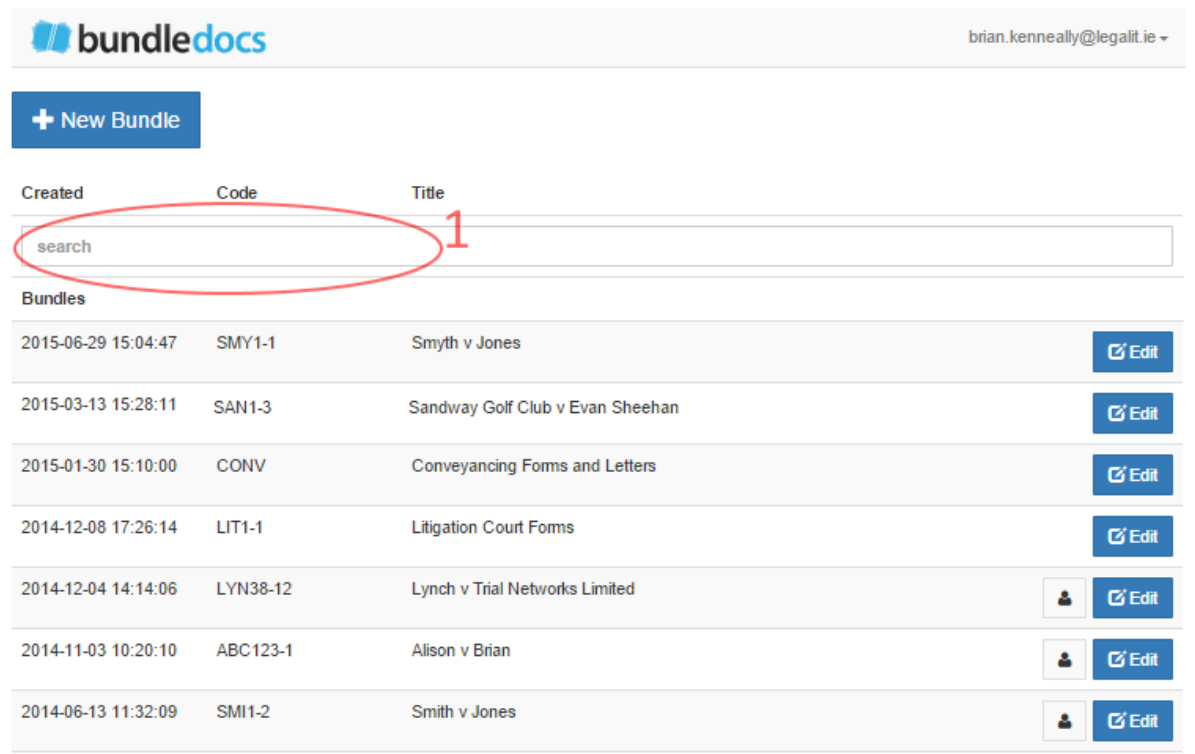
1. Click here to edit the details of your case.

Create additional bundles






1. Select 'New Bundle' to create additional cases

Searching for a bundle

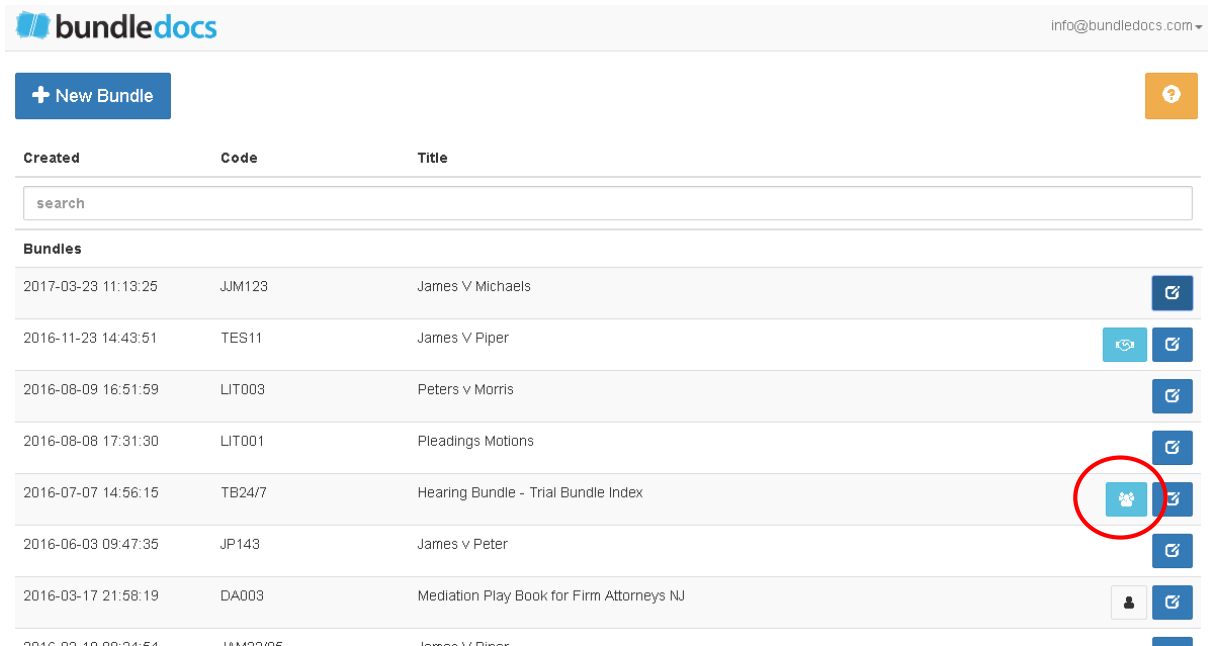


The screenshot shows the Bundledocs web application. At the top left is the 'bundledocs' logo. At the top right is the user email 'brian.kenneally@legalit.ie'. Below the logo is a blue button with a plus icon and the text '+ New Bundle'. Below this is a search bar with the placeholder text 'search'. A red circle is drawn around the search bar, and a red number '1' is placed to its right. Below the search bar is a table with the heading 'Bundles'. The table has three columns: 'Created', 'Code', and 'Title'. There are eight rows of bundle data, each with an 'Edit' button to its right. The bundles are: 1. Created: 2015-06-29 15:04:47, Code: SMY1-1, Title: Smyth v Jones. 2. Created: 2015-03-13 15:28:11, Code: SAN1-3, Title: Sandway Golf Club v Evan Sheehan. 3. Created: 2015-01-30 15:10:00, Code: CONV, Title: Conveyancing Forms and Letters. 4. Created: 2014-12-08 17:26:14, Code: LIT1-1, Title: Litigation Court Forms. 5. Created: 2014-12-04 14:14:06, Code: LYN38-12, Title: Lynch v Trial Networks Limited. 6. Created: 2014-11-03 10:20:10, Code: ABC123-1, Title: Alison v Brian. 7. Created: 2014-06-13 11:32:09, Code: SMI1-2, Title: Smith v Jones.

Created	Code	Title	
2015-06-29 15:04:47	SMY1-1	Smyth v Jones	Edit
2015-03-13 15:28:11	SAN1-3	Sandway Golf Club v Evan Sheehan	Edit
2015-01-30 15:10:00	CONV	Conveyancing Forms and Letters	Edit
2014-12-08 17:26:14	LIT1-1	Litigation Court Forms	Edit
2014-12-04 14:14:06	LYN38-12	Lynch v Trial Networks Limited	 Edit
2014-11-03 10:20:10	ABC123-1	Alison v Brian	 Edit
2014-06-13 11:32:09	SMI1-2	Smith v Jones	 Edit

1. As the number of document bundles created within *Bundledocs* increases, the 'Search All' feature significantly reduces the time taken to find a relevant bundle. Simply type the 'Case Code' or 'Case Title' of the bundle required into the 'Search All' field and Bundledocs will immediately present the bundles that match the search query.

Reveal the owner of a bundle



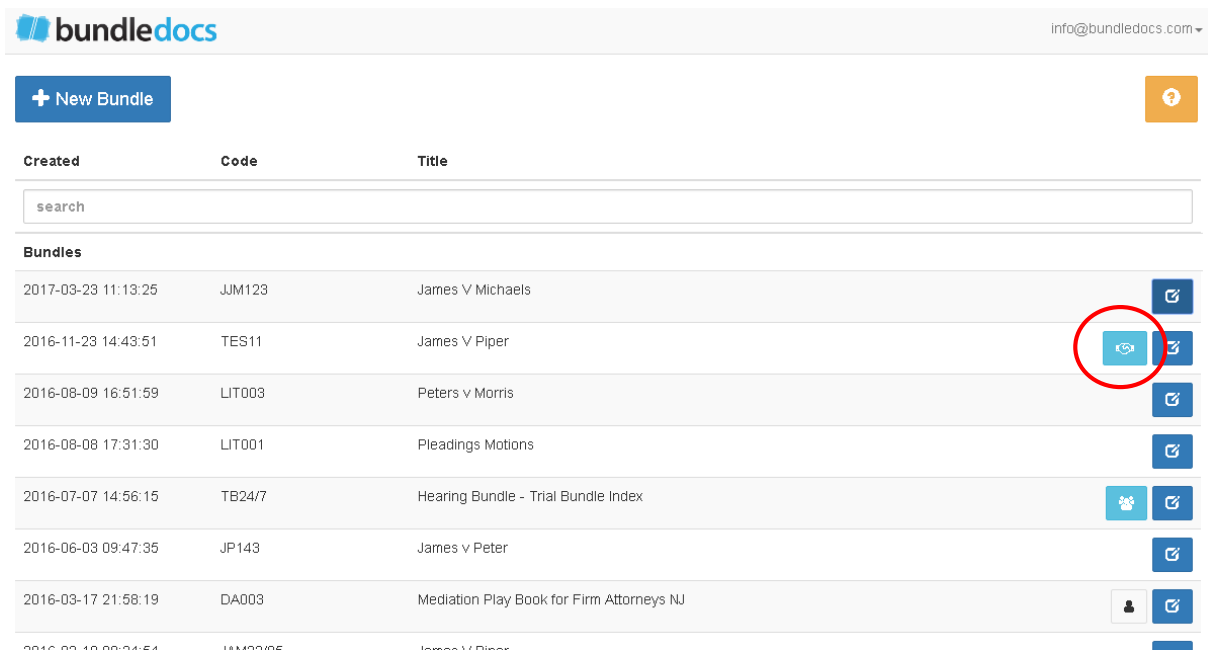
bundledocs info@bundledocs.com

+ New Bundle ?

Created	Code	Title	
<input type="text" value="search"/>			
Bundles			
2017-03-23 11:13:25	JJM123	James V Michaels	
2016-11-23 14:43:51	TES11	James V Piper	
2016-08-09 16:51:59	LIT003	Peters v Morris	
2016-08-08 17:31:30	LIT001	Pleadings Motions	
2016-07-07 14:56:15	TB24/7	Hearing Bundle - Trial Bundle Index	
2016-06-03 09:47:35	JP143	James v Peter	
2016-03-17 21:58:19	DA003	Mediation Play Book for Firm Attorneys NJ	
2016-03-18 09:34:54	JAM2005	James V Piper	

1. If you did not originally create the bundle, a grey silhouette will appear to the right of your bundle. Simply click on the icon, a window will appear and identify the owner of this bundle.

Reveal bundle collaborators



bundledocs info@bundledocs.com


+ New Bundle ?

Created	Code	Title	
<input type="text" value="search"/>			
Bundles			
2017-03-23 11:13:25	JJM123	James V Michaels	
2016-11-23 14:43:51	TES11	James V Piper	
2016-08-09 16:51:59	LIT003	Peters v Morris	
2016-08-08 17:31:30	LIT001	Pleadings Motions	
2016-07-07 14:56:15	TB24/7	Hearing Bundle - Trial Bundle Index	
2016-06-03 09:47:35	JP143	James v Peter	
2016-03-17 21:58:19	DA003	Mediation Play Book for Firm Attorneys NJ	
2016-03-18 09:34:54	JAM2005	James V Piper	

1. If you did not originally create the bundle, a grey silhouette will appear to the right of your bundle. Simply click on the icon, a window will appear and identify the owner of this bundle.

Account Settings


Bundle Defaults




Account Settings

Bundle Defaults

Misc.



Index



Index Title Text

yyyy-MM-dd

2018-11-23

Display Date Format

☐

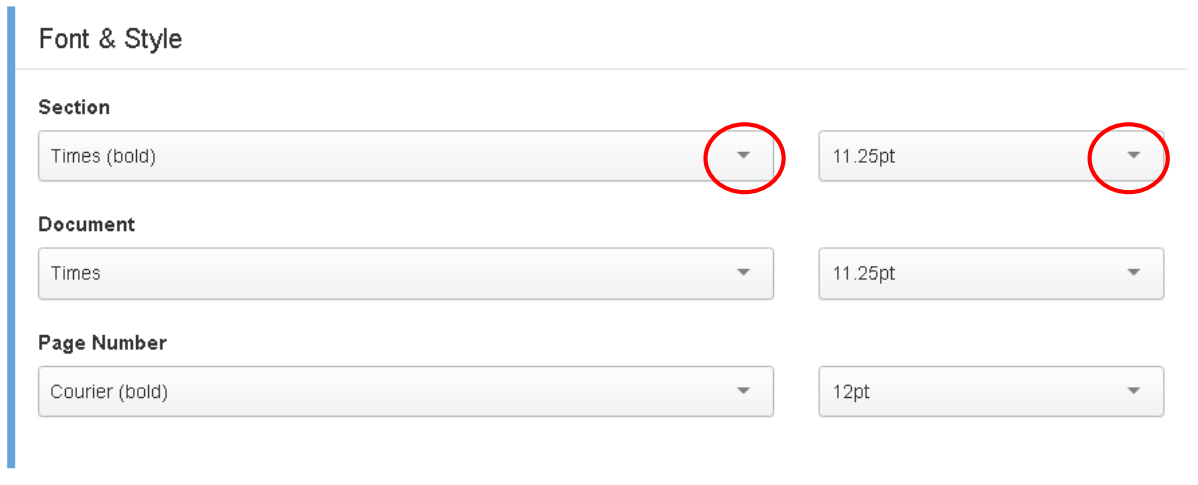
No

Use Source File Dimensions Where Possible?

1. **Index Title Text:** Choose the default text to be used for your Index page. For example, you may prefer to use 'Table of Contents'.
2. **Display Date Format:** Choose a default date format to be used for all new bundles created.
3. **Use Source File Dimensions Where Possible:** Select this option if you would like to always use the original file dimensions in your generated bundle. Bundledocs automatically adjust file to fit into A4. By selecting this option the original file dimensions will always be used in all generated bundles.

Select Update to save all changes made.

Font & Styles



Font & Style

Section

Times (bold) 11.25pt

Document

Times 11.25pt

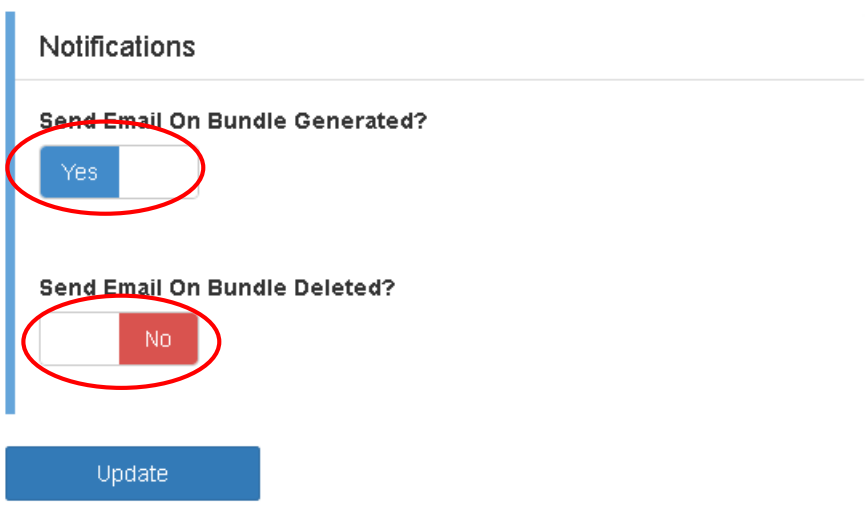
Page Number

Courier (bold) 12pt

The font & Styles section allow you to customise the default font and styles of your bundles. Simply select the dropdown to choose a font and font size for your section, document and page numbers in your completed bundles.

Select 'Update' to save changes.

Notifications



Notifications

Send Email On Bundle Generated?

Yes

Send Email On Bundle Deleted?

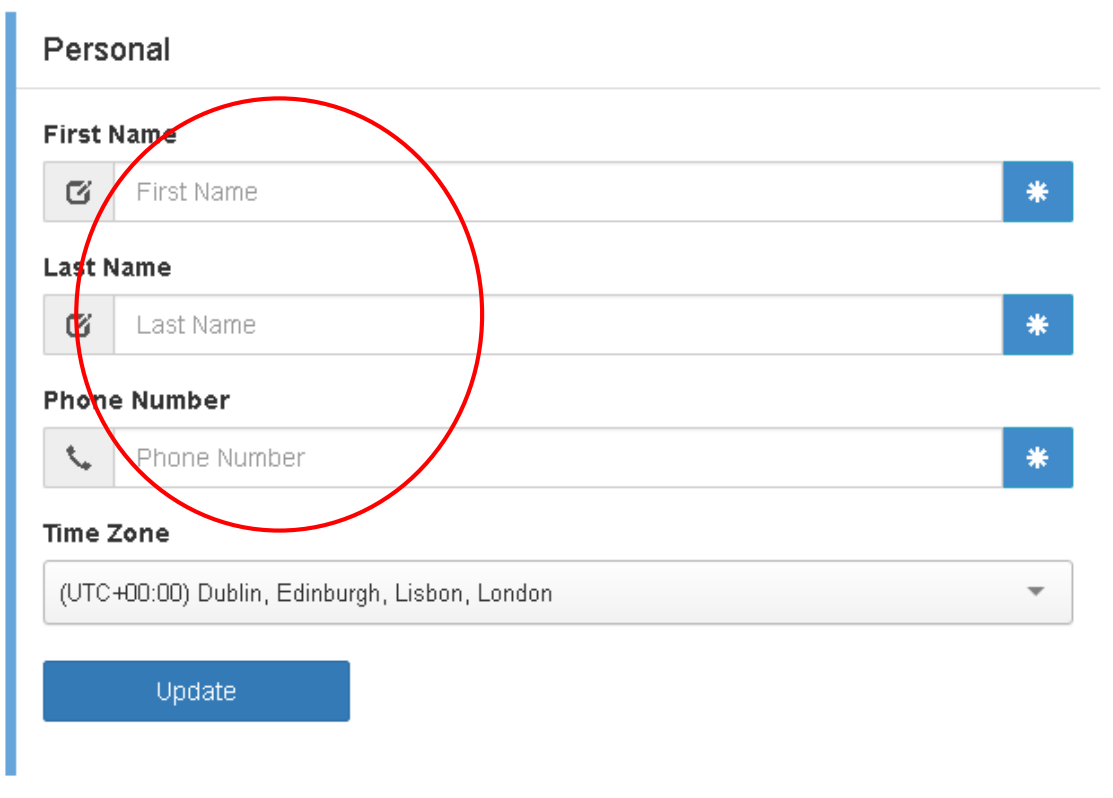
No

Update

1. **Send Email on Bundle Generated?:** Choose if you want to receive the Bundledocs Generated notification email or not. This can be changed at any time. Simply select the 'Send Email On Bundle Generated' option.
2. **Send Email on Bundle Deleted?:** Select if you want to receive a notification when a bundle is deleted. This great when working with others on a bundle. This can be changed at any time.

Select Update to save all changes made.

Personal



Personal

First Name

*

Last Name

*

Phone Number

*

Time Zone

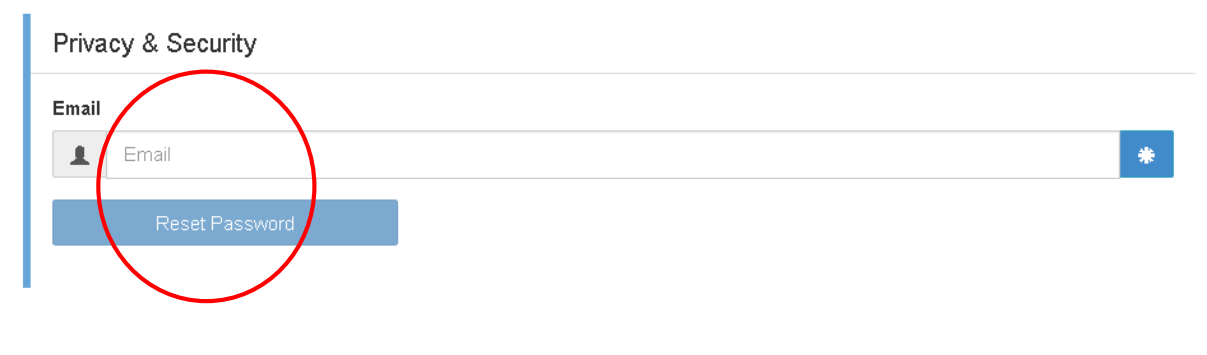
(UTC+00:00) Dublin, Edinburgh, Lisbon, London ▼

Update

1. This section allow you to update your personal information.
2. Select 'Update' to save any changes made.

Privacy & Security

Reset Password



Privacy & Security

Email

*

Reset Password

1. To reset your password, type your email address in the filed provided.
2. Select 'Reset Password'. You will then receive an email with instructions on how to reset your password for your account.

Update Email

Email

info@bundledocs.com ✓

Password

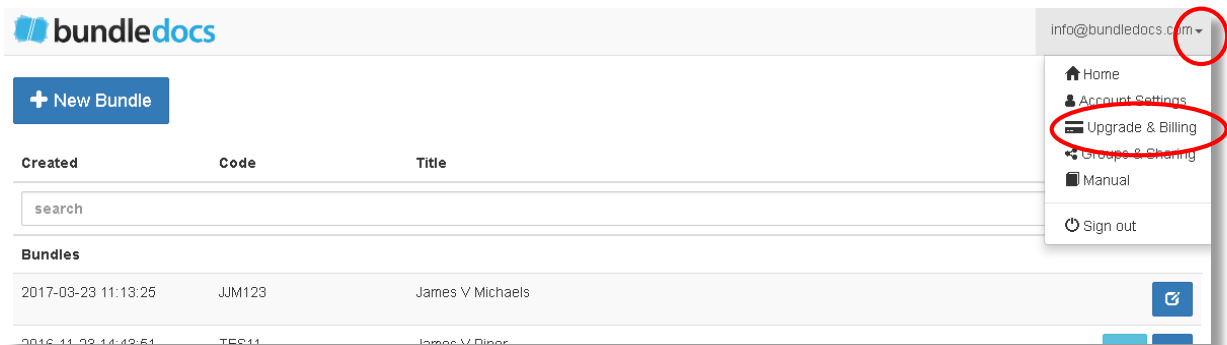
..... ✓

Update Email

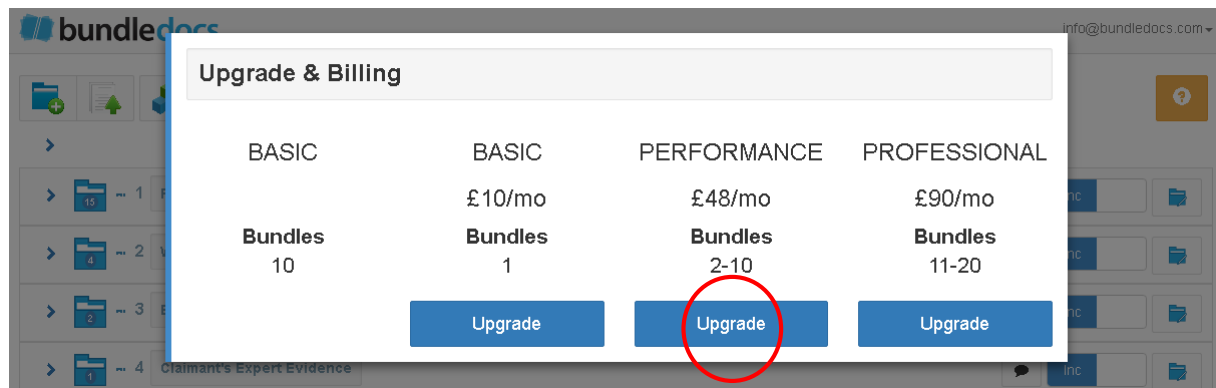
1. To update your account email address, type your email address in the field provided
2. Confirm your password
3. Select 'Update Email'.

Account Upgrade & Billing

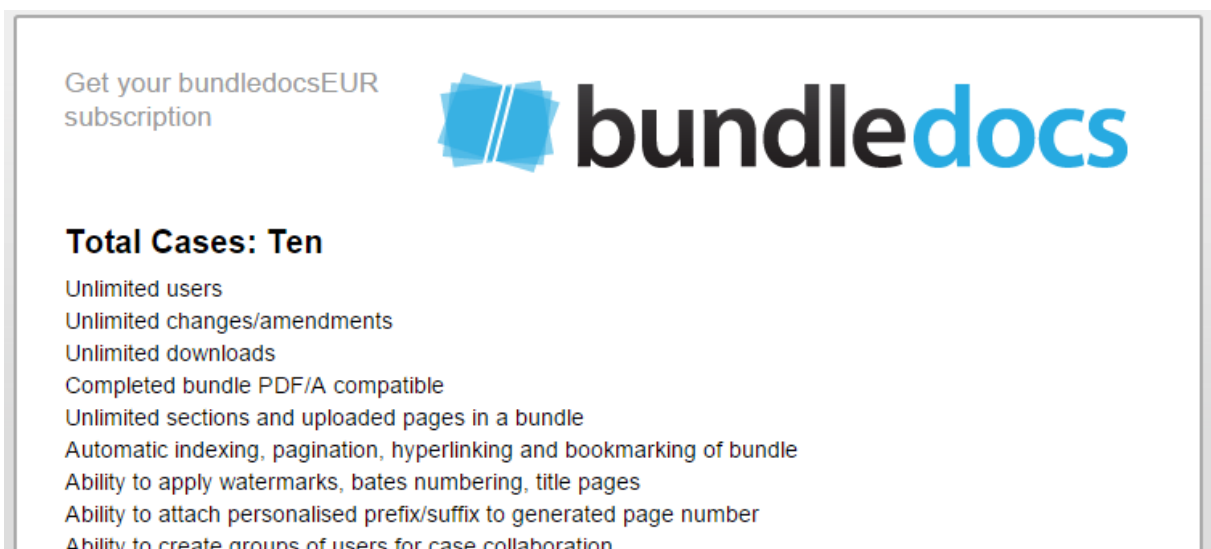
Upgrade your subscription



1. Select your email in the top right corner
2. From the dropdown select 'Upgrade & Billing'

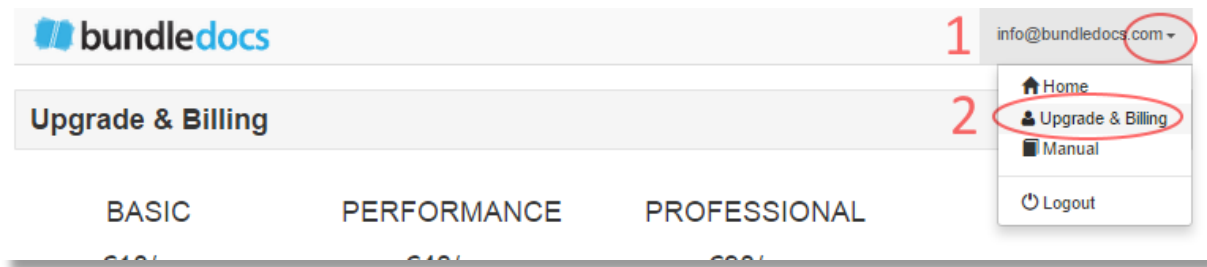


3. From the Upgrade & Billing options, choose how many cases you require. For example: 2-10 Cases. Select 'Upgrade'.

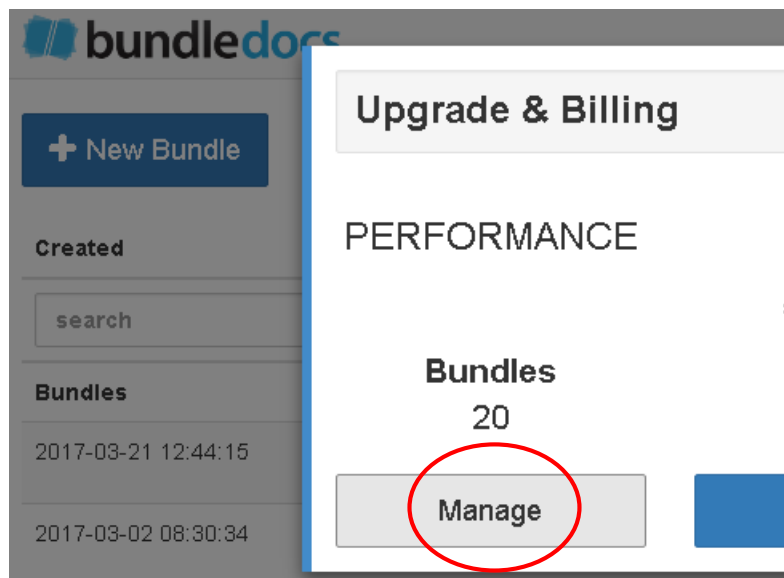


A window will then appear which will enable you to complete the upgrade. Simply provide your credit card details to complete.

Cancel your subscription

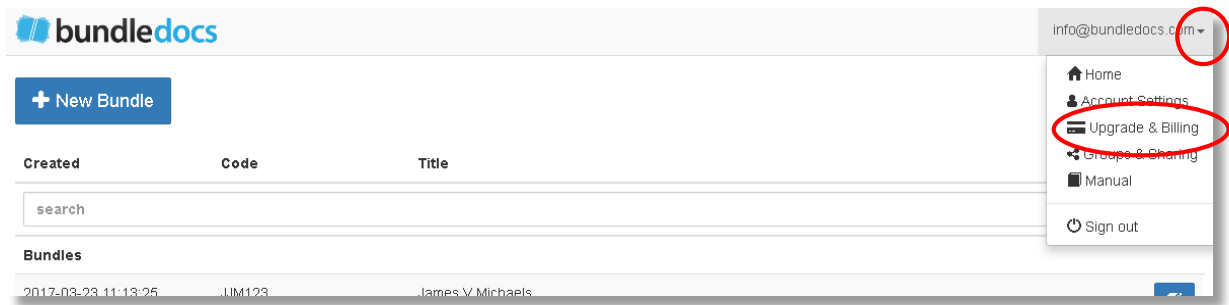


1. Select your email in the top right corner
2. From the dropdown, select 'Upgrade & Billing'

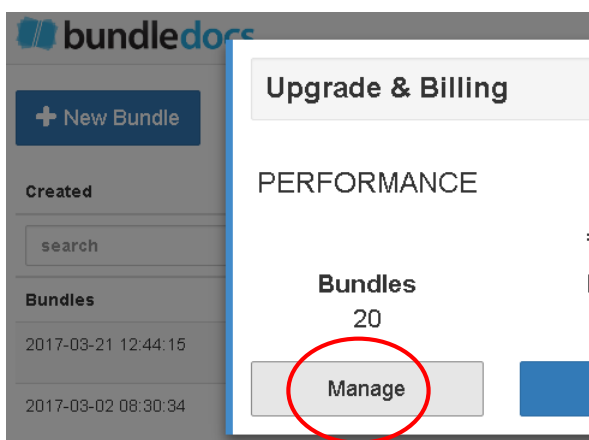


1. To cancel your subscription, select 'Manage'. The 'Manage' icon will appear beneath the plan you are currently subscribed to.
2. Once selected, a window will then appear which will allow you to change your subscription.

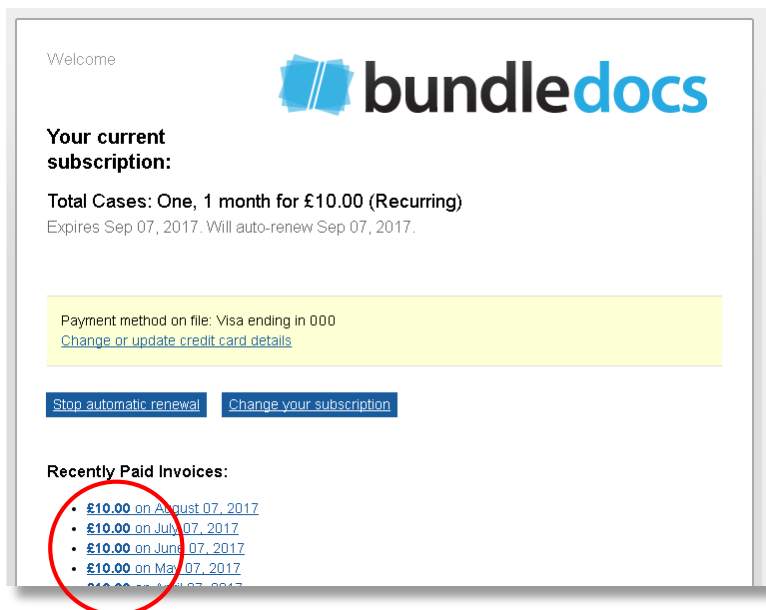
Access your Invoices



1. Select your email in the top right corner
2. From the dropdown select 'Upgrade & Billing'



1. To access your invoices, select 'Manage'. The 'Manage' icon will appear beneath the plan you are currently subscribed to. Once selected, a window will then appear.

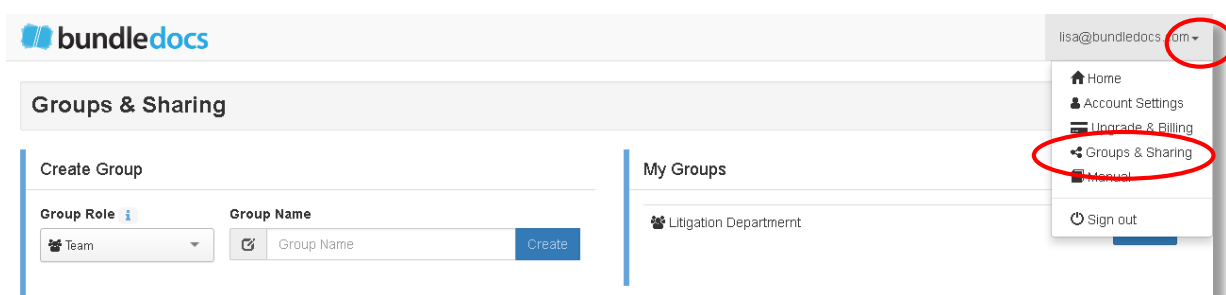


1. All previously generated invoices appear on-screen, as highlighted above. Simply select the invoice to access.

Groups & Sharing

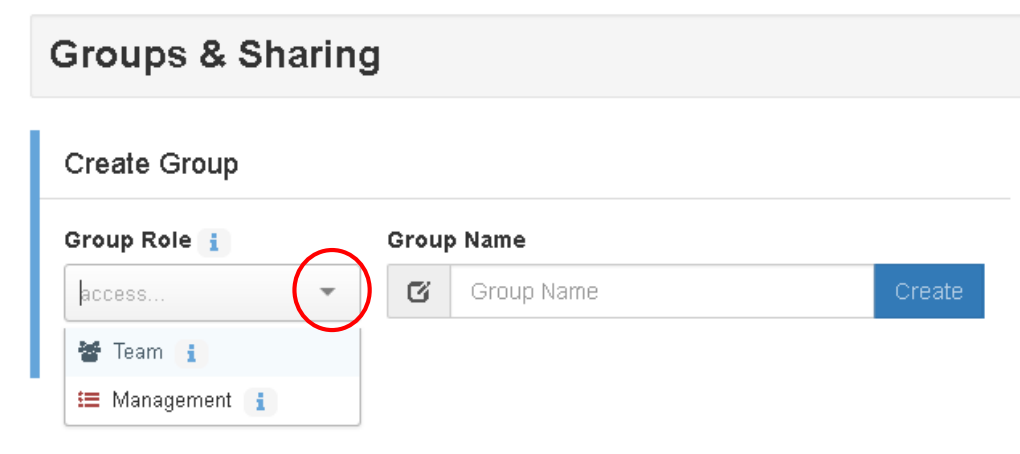
With *Bundledocs* users can easily work together in groups to create bundles. Users simply share their cases with other team members allowing them to access and edit cases created. Unlike the 'Migrate Case' option (as explained previously) cases will not move from your account, but instead other users will be granted access to work on these cases. This is particularly useful if a number of people or departments are working together. Please note: This feature is available for all paid subscriptions.

Access Bundledocs Groups



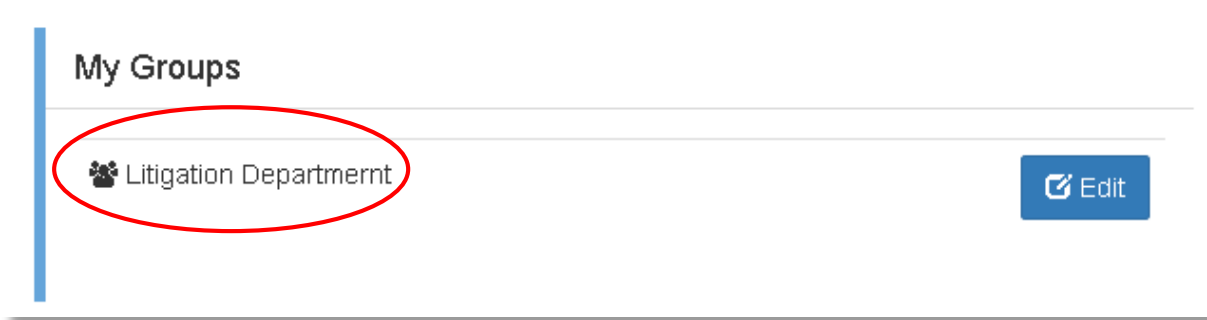
1. Select your username/email address in the top right corner.
2. A dropdown will appear. From the options, select 'Groups and Sharing'.

Create a Group



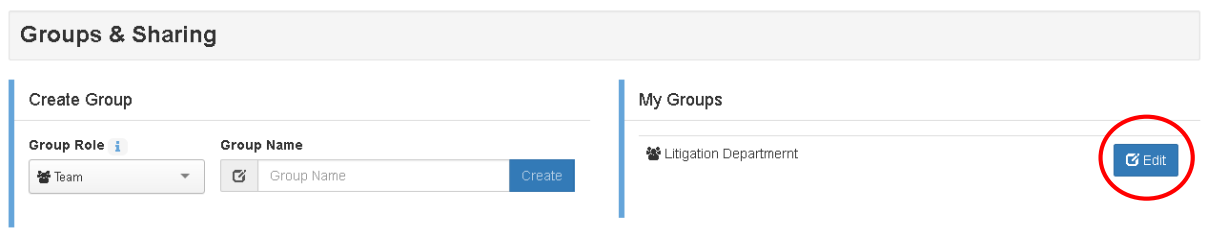
1. Within the 'Create Group' section, choose a group role from the dropdown.
 - a. Team: Bundles are shared with other team members
 - b. Management: Bundles are only visible to the owner
2. Provide a group name
3. Select 'Create' to confirm. All groups will appear within the 'My Groups' section.

My Groups

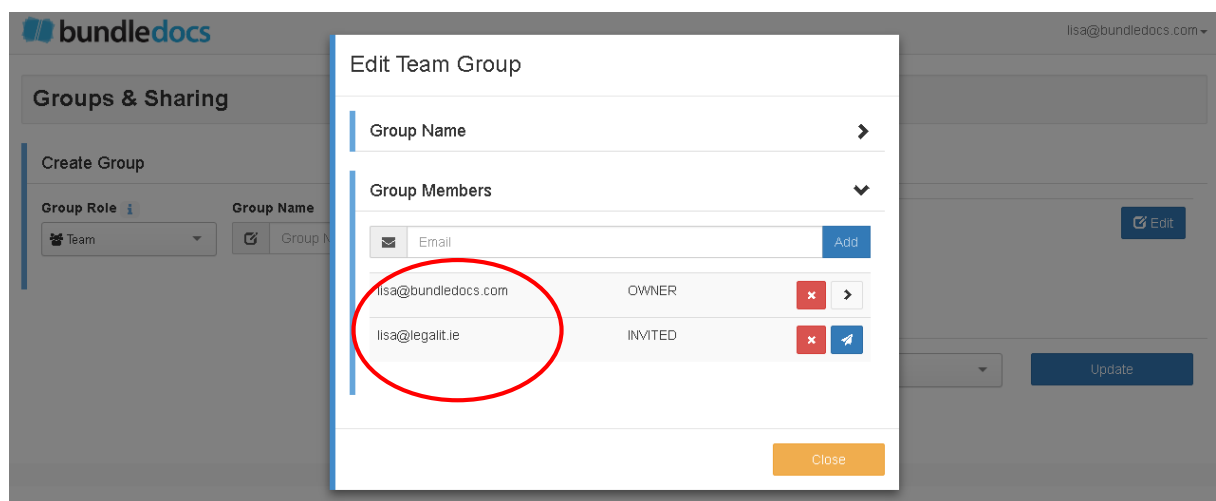


1. All groups you are a part of are listed within the 'My Groups' section.

View Group Members

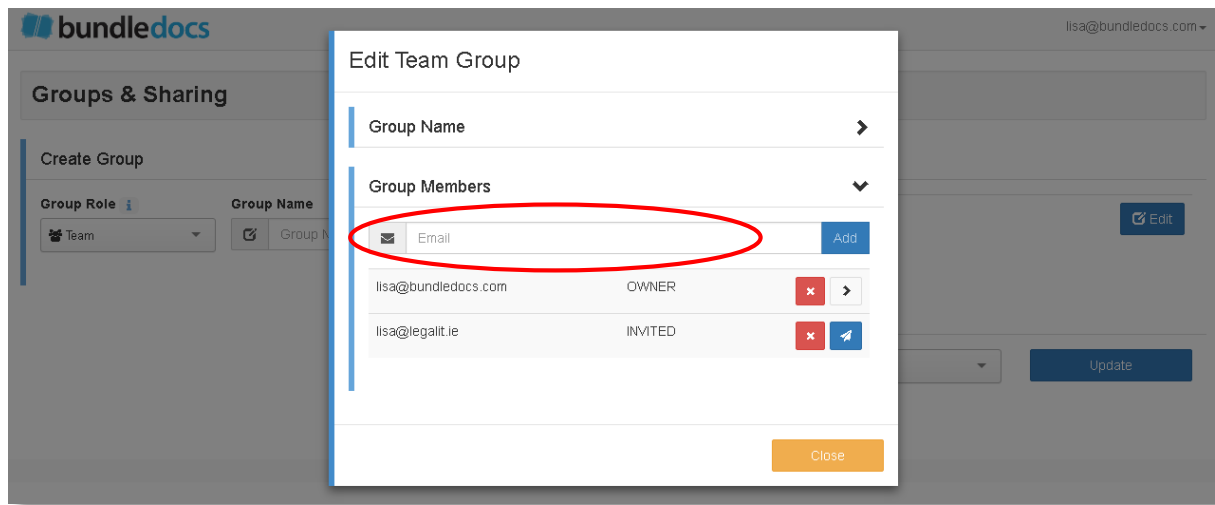


1. To view your group members, select the 'Edit' button that appears to the right of your group. A window will then appear.



1. Expand the 'Group Members' section
2. All those that are members of your group will be listed here. You will be able to see whether they are the owner, members or invited (i.e. they have yet to accept the invitation to become part of this group).

Invite members to a group



1. Within the 'My Groups' section, find the group you wish to invite users to. For example: 'Litigation Department'. Next to the section name, select the 'Edit' button.
2. The 'Edit Team Group' window will then appear. Within the 'Group Members' section, type the email address of new members within the field provided.
3. Select 'Add'. This will send an invitation to this user to become part of this group.

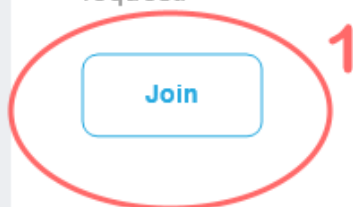
If this user is not already a Bundledocs user then they will first receive an email asking them to create an account with us. This is a great way to quickly and easily add new users to Bundledocs.



A request has been made for you to join the following group.

Litigation Department

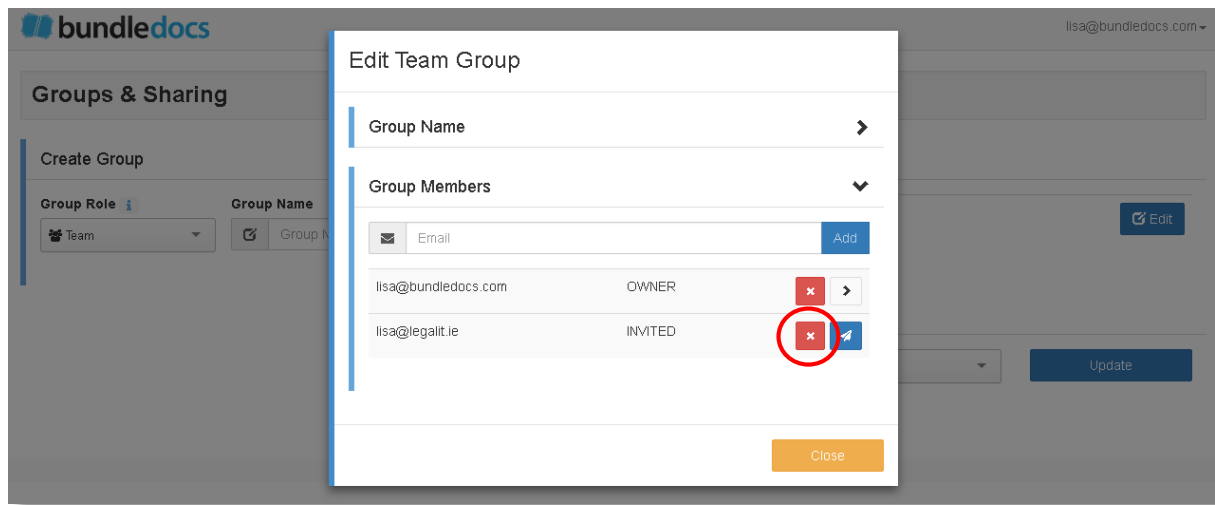
Click 'Join' below to join this group, or you can choose to ignore this request.



1. The recipient will receive a 'Group Invitation email'. As shown above, it will contain a button to join the group. The recipient should click the 'Join' button.

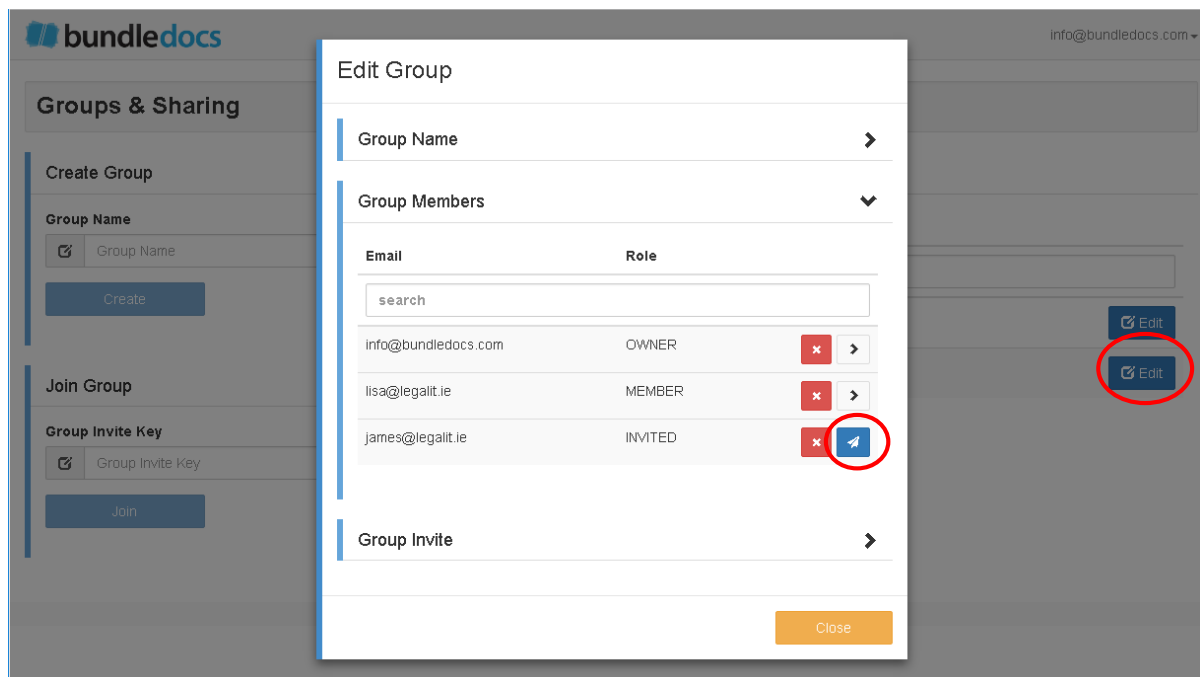
The recipient will be prompted to login to their Bundledocs account. They will then be automatically added to the group. Therefore, the group will appear within the 'Group Info' section.

Remove member from a group



1. The 'Group Members' section contains a list of all group members. To remove a user from a group, select the 'X' next to their username/email address.
2. You will be prompted to confirm the removal of the user from this group. Select 'OK' to confirm removal.

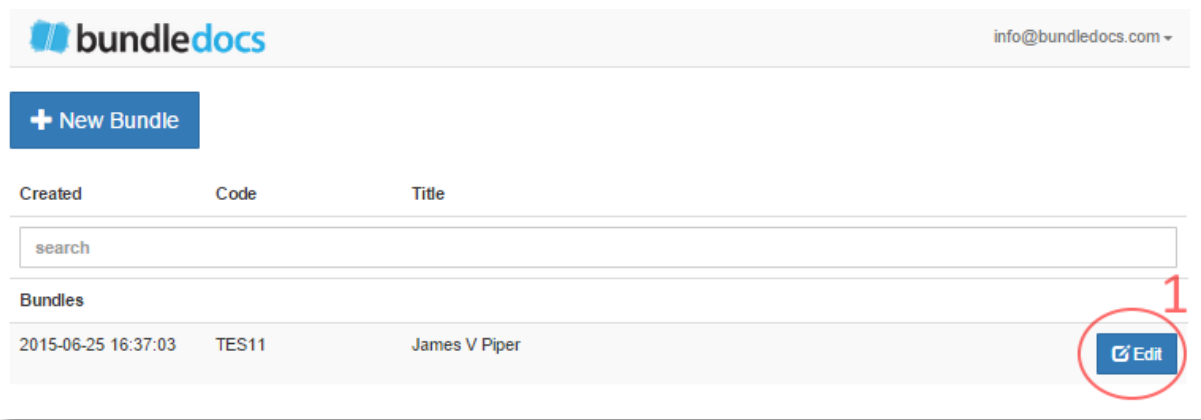
Resend a group invitation



1. The 'Group Members' section contains a list of all group members. To re-send an invitation to any user select the send icon, as highlighted above.

Make a Bundle Private

If you do not wish to share specific cases with the group, you can choose to exclude these cases. Simply follow these steps:



1. From the home page, select the 'Edit Details' button. This button is located to the right of your case. A window will appear once selected.

Update Bundle

Code (e.g. ABC20/1)

☒

Title (e.g. James v Piper)

☒

Advanced ☐

Access Type

Make this bundle available to groups?

☒ No

Show Document Date on Screen?

☒ No

Default Date Format

Share

Migrate

1. Expand the 'Advanced' section.

Within 'Make this bundle available to groups', select 'No'. This will make this case private so only you will be able to see it.

Note: A grey silhouette will appear to the right of any case you have made private. As shown below:

James V Piper	<input checked="" type="checkbox"/>
Cornell V Grimes	<input type="checkbox"/>

Contact the Bundledocs Team Today!

Any Questions? We endeavor to help you with any queries or issues you may have. Get in touch with the Bundledocs team today. We're here to help!

CONTACT

Call: +353 (0)21 4826320

Email: info@bundledocs.com

Web: www.bundledocs.com

Postal Address:

Westpoint Business Campus,
Link Road,
Ballincollig,
Co. Cork,
Ireland