

## Sending Letters to Clients

### All Attorneys except Dan/Don

1. After receiving approval from the attorney, open CORO version.
  2. Check dates and any other possible formatting errors.
  3. Add attorney e-signature
  4. File -> save as Adobe PDF -> Desktop
  5. Check Enclosures in TM or email chain and drag and drop them into the PDF letter
  6. Save PDF letter to TM
    - a. **Code:** EXEC (for "Executed Copy")
    - b. **Desc:** Same as Coro (paste CORO name)
    - c. **Staff:** You + Attorney (if Jeff's letter then you + Jennifer)
      - i. This is who will get the follow-up so if you're sending for someone else put you+them+attorney
    - d. **Follow-Up:** Adjust as necessary (please refer to Follow-Up cheat sheet)
    - e. **Save and close**
  7. Save JPEG image of the first page of your letter
    - a. Shift + select first page in PDF
    - b. Right click -> extract page
    - c. File -> Save As -> Image (JPEG) -> Save to Desktop
    - d. Close out of extracted pages
  8. Click on the envelope in Reader and attach to email

**From:** your email  
**To:** copy from CORO  
**CC:** copy from CORO (if applicable); the attorney you are sending on behalf of (If Jeff, cc Jennifer)  
**Subj:** Copy Re Line from CORO  
\*if the mark is an image copy the matter reference\*  
**Body:** Insert "Other Attorney" signature block
  - Edit "Dear\_\_" and attorney name
  - Insert JPEG:** Insert -> Picture -> Select from Desktop
9. **DOUBLE CHECK EVERYTHING**
  10. Send
  11. Save the email to Time Matters

## **Sending Dan/Don Letters to Clients**

1. After receiving approval from the Don, open CORO version.
  2. Check dates and any other possible formatting errors.
  3. Add D.M. Cislo Esq. E-signature
  4. File -> save as Adobe PDF -> Desktop
  5. Check Enclosures in TM or email chain and drag and drop them into the PDF letter
  6. Save PDF letter to TM
    - a. **Code:** EXEC (for "Executed Copy")
    - b. **Desc:** Same as Coro (paste CORO name)
    - c. **Staff:** You + QCC
      - i. This is who will get the follow-up so if you're sending for someone else put you+them+attorney
    - d. **Follow-Up:** Adjust as necessary (please refer to Follow-Up cheat sheet)
    - e. **Save and close**
  7. Save JPEG image of the first page of your letter
    - a. Shift + select first page in PDF
    - b. Right click -> extract page
    - c. File -> Save As -> Image (JPEG) -> Save to Desktop
    - d. Close out of extracted pages
  8. Click on the envelope in Reader and attach to email

**From:** your Dan email  
**To:** copy from CORO  
**CC:** copy from CORO (if applicable);  
**Subj:** Copy Re Line from CORO  
\*if the mark is an image copy the matter reference\*  
**Body:** Insert "Dan's Signature" signature block
  - Edit "Dear\_\_"
  
  - Insert JPEG:** Insert -> Picture -> Select from Desktop
9. **DOUBLE CHECK EVERYTHING**
  10. Send
  11. Save the email to Time Matters