

LienWriter.com


5049 Robert J. Mathews Parkway • Suite 400 • El Dorado Hills, CA. 95762
Timi Pereira Phone: (916) 941-9961 ext. **203** • Fax: (916) 939-7092 • www.lienwriter.com

INSTALLING LIEN WRITER™ FOR THE FIRST TIME

Section 1: Installation

Step 1: Insert the CD-Rom labeled **Setup CD (Windows 95, 98, ME, NT, 2000, XP)** into your CD-Rom drive. The CD-ROM Auto Start should kick in and open the **Setup Wizard**. If not, simply double click the **MY COMPUTER** icon on your desktop. Double click on the icon for your **CD-Rom**. This will display the contents of your **Setup CD**, continue on to step 2.



Step 2: Click on  and follow the on screen instructions. You will reach the **Lien Writer™ by Lien Writer SOFTWARE Setup Wizard**. Click **Next** to begin the installation.

Step 3: Read the **License Agreement**, choose **I Agree** and click **Next**.

Step 4: At the **Select Installation Folder** screen you get the opportunity to change the directory for Lien Writer™. We recommend you accept the default **C:\Program Files\Lien Program** directory to simplify future upgrades and Technical Support troubleshooting. Click **Next** to continue.

Step 5: You will reach the **Confirm Installation** screen. Click **Next** to continue. At this point you should see a progress bar in your installer menu. When the installation is complete, you will be see an **Installation Complete** screen.

Section 2: Registration




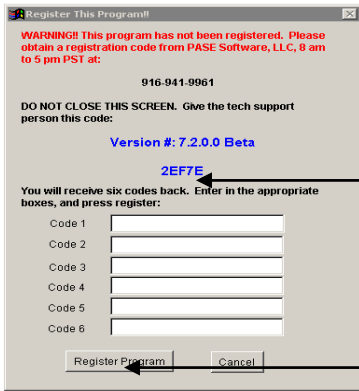
To start Lien Writer™, double click on the  icon on your desktop. Another option is to go to your programs menu, look for PASE SOFTWARE program group, expand it, and click on the listing for **Lien Program**. The first screen you will come to upon entering Lien Writer™ is the **Program Registration** screen. You will be given a **five-digit code** (in blue) and prompted to call PASE Software Customer Service at (916) 941-9961 ext. **206**. After you have entered the registration codes, click the Register Program button to continue.

Figure 1: Registration Screen



1. Five-digit code to give PASE Software rep.

2. After entering your codes, click **Register Program**

Section 3: Company Setup

Continue through the other **Program Information** screens until you reach the **Company Setup** screen.

Figure 2: Company Setup Screen

Step 1: Complete each of the text boxes by entering your company information.

Note: If you are not sure what information belongs in a field, **press F1 on your keyboard for a Help definition.**

Step 2: Click continue to printer setup.

Note: If there is **no continue**, click **close** at the bottom right of this screen.

Section 4: Printer Setup

From the **Printer Setup** Screen you can choose which printer(s) will be used to print reports, notices and labels. Click the **Printer** icon to the right of each selection and choose the printer you want the notice, report or label to print on.

Figure 3: Printer Setup Screen

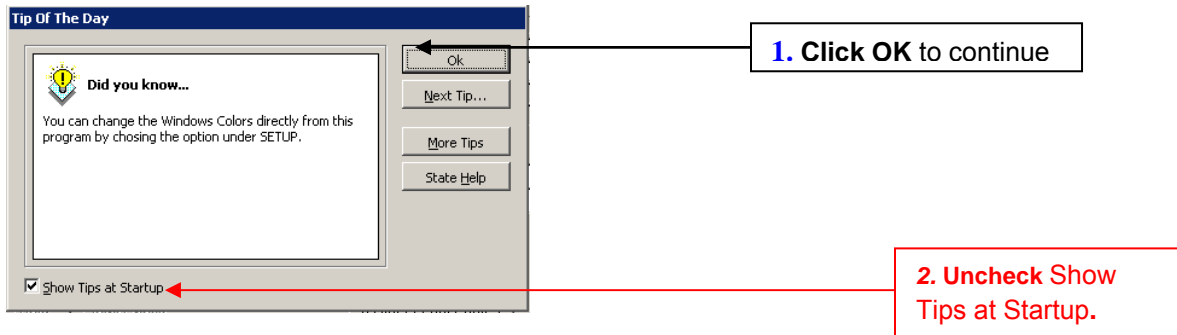
1. Click this icon to select a printer

2. Click to select a printer

See next page for final step

Section 5: Tip of the day

After you have selected all four of your printers, click the Close **Screen** button. Lien Writer™ will begin a process of re-indexing the data files. When this is done you will be taken to a **Tip of the Day** screen. Click **OK** to continue. You are now ready to start using Lien Writer™. *If you do not wish to see a Tip of the Day when Lien Writer™ opens, uncheck Show Tips at Startup. (See step 2).*



Section 6: Current Jobs

The Current Jobs File is where you will create and edit job information, print notices, schedule follow-up calls, and keep detailed notes about your jobs.

The Current Jobs File breaks job information down into different sections (Customer, Project, Owner, etc.). Each section of information is represented by a tab in the Current Jobs File. Notice that each tab has a title which describes the information contained in that section. Click on a tab to display the corresponding information.

Figure 4: Current Jobs Screen

The image shows the 'Current Jobs File' application window. It features a tabbed interface with tabs for 'Notes', 'User Defined Fields', 'Trust Fund', 'Property Desc.', 'Labor / Materials Desc.', and 'Accounting Data'. The 'Customer' tab is selected. The main area contains various input fields and checkboxes for customer information, including 'Company', 'Job or Inv. Number', 'Customer Number', '2nd Line Customer', 'Address', 'Zip', 'City', 'State', 'Phone', and 'Fax'. There are also checkboxes for 'Print Customer Notice', 'Certified Mail', 'Printed?', 'Monthly Release', 'Release Cycle', 'Marked', 'Paid', and 'Joint Check'. A 'Find' button and an 'Auto Seq. #' field are also present. On the right side, there is a vertical toolbar with buttons for 'Add Job', 'Next', 'Previous', 'Top', 'Bottom', 'Delete', 'Print', 'Sort', 'Locate', 'Browse', 'Calendar', 'Close', 'Set Filter', and 'SEARCH'. At the bottom, it displays 'Record #13 of 13', 'Sorted by CUSTOMER', and 'Table LIENS'.

Definition of Common Terms for the Mechanics Lien Process

Customer: The person or business entity to whom you supply with your labor, materials or services that generate a lien liability on the property of the owner, or money or bond lien on the public entity or payment bond company.

Project: Also known as a job. This defines the present location or site where your materials will be delivered or your labor or services performed.

Owner: The person or business entity that holds title to the property, and is ultimately responsible for work performed on the property. Some states allow liens on land that is owned outright (a fee interest) and also on land that is rented long term (a leasehold interest).

General (General Contractor): The person or business entity that has a direct contract with the owner or public entity.

Lender: The person or business entity who provides financing for the project, be it a bank, mortgage company, individual, etc. Not all projects have lenders, and public projects almost never have lenders.

Dates and Dollars: This is the tab where any dates or dollar amounts are entered.

Section 7: First step in creating notices

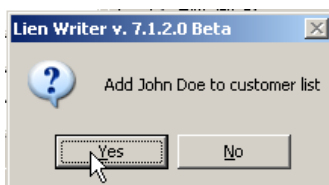
Figure 4: Current Jobs Screen

The screenshot shows a software window titled "Current Jobs File: ->". It has a menu bar with "Notes", "User Defined Fields", "Trust Fund", "Property Desc.", "Labor / Materials Desc.", and "Accounting Data". Below the menu bar is a sub-menu bar with "Customer", "Project", "Owner", "General", "Lender / Surety", "Dates & Dollars", and "Accounting Data". The "Customer" sub-menu is selected. The main area contains several input fields: "Company" (dropdown), "Job or Inv. Number", "Customer Number" (with "Find" and "Auto Seq. #" buttons), "2nd Line Customer", "Address", "Zip", "City", and "State". There are also checkboxes for "Print Customer Notice", "Certified Mail", "Printed?", "Monthly Release", "Marked", "Paid", and "Joint Check". Fields for "Reference", "File Number", "Record Id", "Phone", and "Fax" are present. At the bottom, there are buttons for "Other Legal Parties" and "Other Liensing Parties". A "SEARCH" button is in the bottom right corner. The status bar at the bottom shows "Record #13 of 13", "Sorted by CUSTOMER", and "Table LIENS".

Step 1: Click on the **Add Job** button at the upper right hand side of the **Current Jobs File**. This will create a blank record, assign the record a reference number and prepare you to enter job information.

- Step 2:** **Select your company code by clicking** the inverted triangle▼ **to the right of the Company field.** Lien Writer™ Single-State allows you to create a single company. The Lien Writer™ Multi-State version allows an unlimited number of companies. In either version you must select a company code before you can continue. The company code tells Lien Writer™ what information to print on your Lien Documents.
- Step 3:** **Job or Inv. Number:** This can contain letters, numbers or both. If you don't use job numbers, you should consider using them. They are a great way to track your jobs in Lien Writer™. You may also choose to enter invoice numbers or sales codes here instead.
- Step 4:** **Customer Number:** You can enter existing numbers from your own customer system or create them. If you do not wish to use customer numbers, this field can be left blank.
Note: You may also use your accounting software's customer numbers. There are features to import from your accounting software into Lien Writer™.
- Step 5:** **Customer Name:** **Enter the name of the person or the company you are contracted to.** If you would like to search for an existing record in the Reference File you can do so by clicking on the button to the right of the Customer field.
- Step 6:** **2nd Line Customer:** Use this field **if you need more room for a Customer name or a DBA.**
- Step 7:** **Address:** **Enter the Customer's address.**
- Step 8:** **Phone Number/Fax Number:** **Enter the Customer's phone and fax numbers.**
- Step 9:** **Zip:** **Enter a zip code;** Lien Writer™ will search the Zip Code file for a match. If a match is found, Lien Writer™ will insert the City and State information automatically. Lien Writer™ will then attempt to find a matching record in the Reference File. If no match is found, a dialog box similar to the one shown below will appear. Click **Yes**, and Lien Writer™ will create a new record in the Reference File which you can use to save re-typing information in the future. Click **No** to continue entering information without adding a new record to the Reference File. *Note:* See below for an explanation.

Figure 5: Add to customer list Screen



- Step 10:** The **Cert No. field** is a place for you to **enter the certified number from your green card** to display on the notice . You can setup this section with a Lien Writer™ Tec. and this field will not be displayed during each notice (*see Note: on page 7 for explanation*).

Once you've completed these steps, **click on the Project tab to continue.** After completing:

- ✓ **Customer**
- ✓ **Project**
- ✓ **Owner**
- ✓ **General**
- ✓ **Lender**

Click on the Dates & Dollars tab to enter any dates or dollar amounts on this specific job

Section 8: Printing your notice

The **Print** tab, when clicked, will display a selection of notices and forms that you can print for a particular job. Once you **select a notice** or form, Lien Writer™ will display another screen where you can edit information as needed. Follow the next two screens below.

Figure 4: Current Jobs Screen

Current Jobs File: ->

Notes | User Defined Fields | Trust Fund | Property Desc. | Labor / Materials Desc. | Add Job

Customer | Project | Owner | General | Lender / Surety | Dates & Dollars | Accounting Data | Next

Previous

Top

Bottom

Delete

Print

Sort

Locate

Browse

Calendar

Close

Set Filter

SEARCH

Company [] Reference 16

Job or Inv. Number [] File Number 16

Customer Number [] Find Auto Seq. # [] Record Id 19102CX00

Customer [] Find Fn Key Help

2nd Line Customer [] Phone () - []

Address [] Fax () - []

Zip [] City [] State []

Print Customer Notice Certified Mail Cert No. []

Printed? Monthly Release Release Cycle []

Marked Paid Joint Check 0 Other Legal Parties

AR Number [] PO Number [] 0 Other Liening Parties

Record #13 of 13 Sorted by CUSTOMER Table LIENS

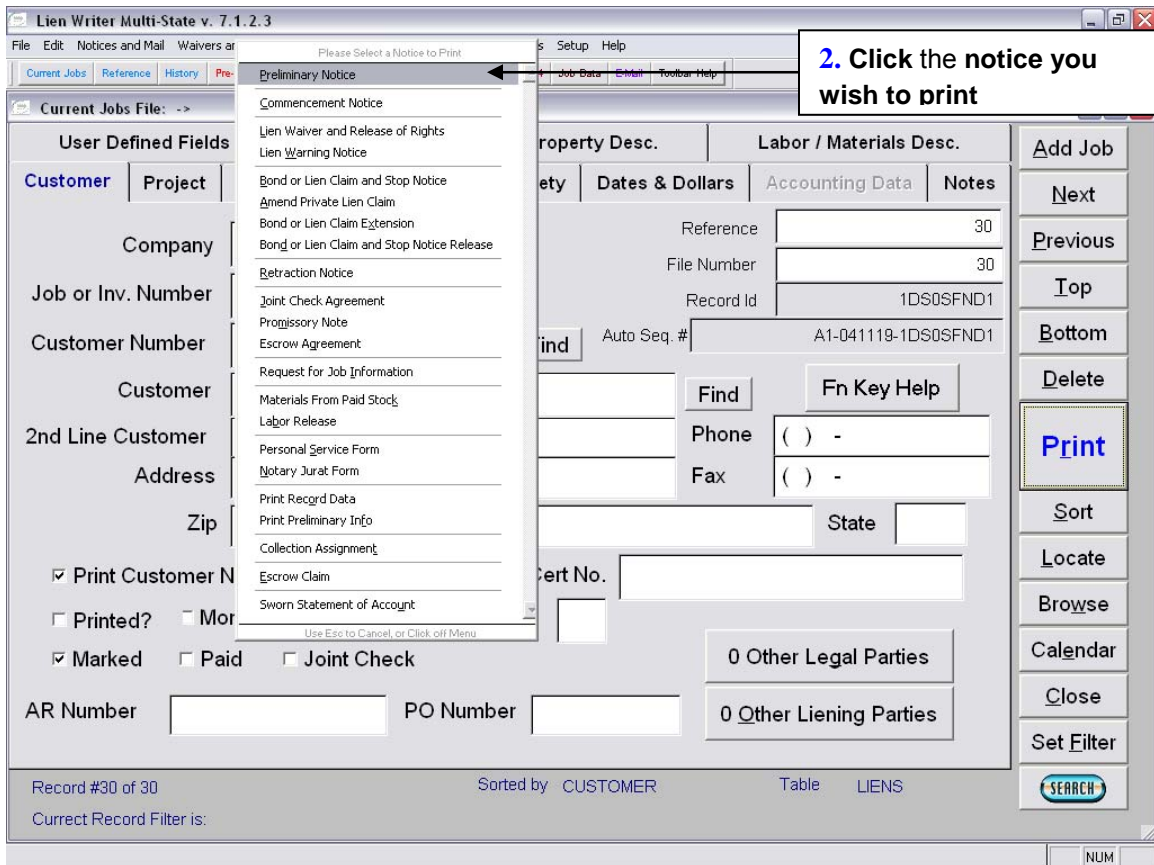
Current Record Filter is:

1. Click the Print tab to select notice

After clicking the Print tab you will be taken to the Select a notice screen.

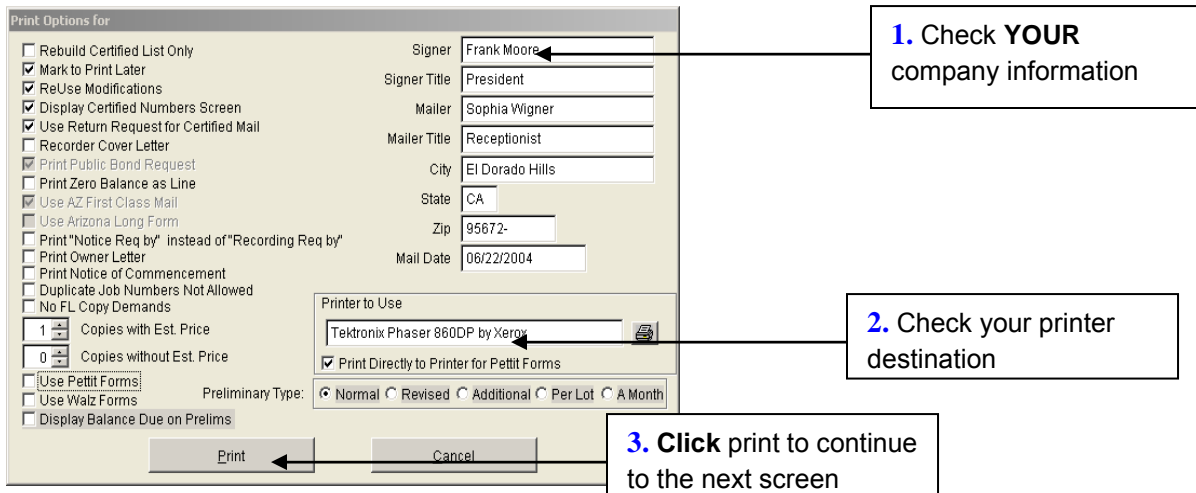
See next page for second screen

Figure 6: Select a notice Screen



After clicking the notice you will be taken to the **Printer options for Screen**.

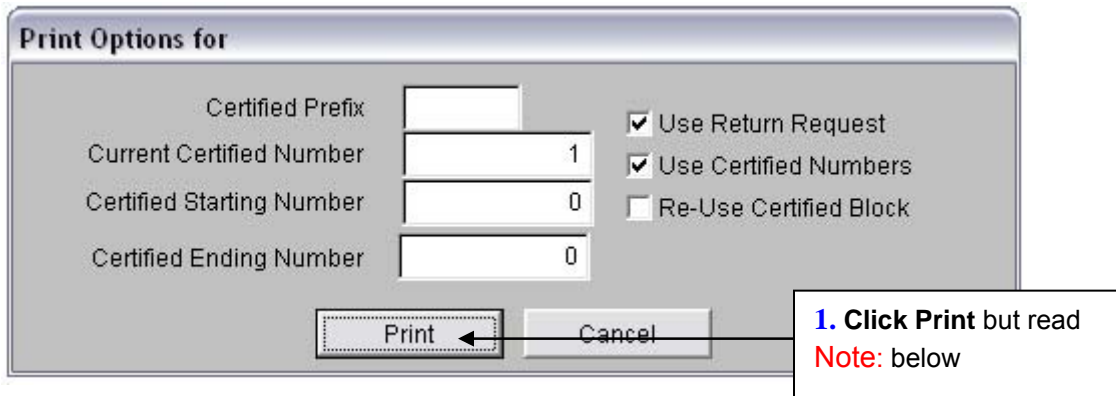
Figure 7: Print options for Screen



After clicking print you will be taken to the **Print options/Certified Prefix Screen**.

See back for last two steps

Figure 8: Print options/Certified Prefix Screen



Note: After purchasing Lien Writer™ you have the option to setup your certified mailing with Technical Support. You can enter the first and last certified mailing number in your stack, and never have to reenter any numbers (unless stack of certified mailing numbers are used).

Figure 9: Print Preview Screen

