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# FOXIT PHANTOMPDF

## FOR LEGAL PROFESSIONALS

Versions 10, 11, & 12

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# **Foxit PDF Editor**

## **FOR LEGAL PROFESSIONALS**

### **SITE LICENSE**

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The materials in this book were written using Foxit PDF Editor 12 and all steps and instructions were tested prior to the publication date. Your software experience may vary slightly from what is seen in this manual if you have a previous version.

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# MEET OUR TEAM OF PDF EDITOR EXPERTS

Meet our team of PDF Editor experts who have co-authored this manual.



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As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training he focuses on automating documents and teaching CLE classes for attorneys across North America.

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When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.



# FOXIT PDF EDITOR FOR LEGAL PROFESSIONALS

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# CHAPTER 1

# INTRODUCTION

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## PDF File Types

### PDF/A

PDF/A (archival PDF) is a type of PDF that is used for the long-term storage of documents. Standard PDF files rely on external information, such as font libraries, to be read, and this can pose problems for retrieval far in the future. PDF/A files, on the other hand, have all information embedded in the file and do not rely on external information. This is useful for archiving, as anyone with a PDF/A reader can view a PDF/A file without the need for appropriate external information. The drawback to this is that because all information must be embedded in PDF/A files, they tend to be larger than regular PDF files.<sup>1</sup> For a more detailed description of PDF/A, see the description provided by the Sustainability of Digital Formats Planning for Library of Congress Collections here: <http://tinyurl.com/4wfwazy>. PDF/A matters to law firms because many of the electronic case filing systems require PDF/A or may require it in the future.

### Image Only PDFs

This type of PDF is visually an exact replica of the original document (whether the original document was electronic or paper-based), but it contains no text which could be searched by any program. This also means that you cannot copy and paste text from the document. This is usually the type of PDF that you get when you scan a document using a copier, scanner, or multifunction machine.

### Searchable PDFs

This type of PDF is also an exact replica of the original document, but it also contains a hidden layer of text so that you can search for any word on any page. PDFs created from other computer programs electronically are searchable by default. In other words, if I create a PDF from a Word or WordPerfect document, an Excel workbook, or an email, they are always searchable. As mentioned above, PDFs created by scanning can be, but are not always, searchable. The software you're using to scan will determine whether you can create searchable PDFs. So that you can easily find the PDF documents you're looking for, you want to use searchable PDFs.

## PDF Editor Versions

This manual covers Foxit PhantomPDF versions 10 and Foxit PDF Editor versions 11 and 12. Differences are noted throughout, but the software is generally referred to PDF Editor.

---

<sup>1</sup> What Is PDF/A? CVISION Technologies, Inc. See <http://tinyurl.com/lxqnsag>

There are three versions of PDF Editor: PDF Editor Pro+, PDF Editor Pro, and PDF Editor (formerly PhantomPDF Business and PhantomPDF Standard). A comparison chart of the features is available here: <https://www.foxit.com/shopping/>.

Features limited to PDF Editor Pro+ include Foxit eSign signature service and cloud/mobile applications. Features limited to PDF Editor Pro(+) include bates numbering and redaction.

# CHAPTER 2

# MICROSOFT INTEGRATION

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PDF Editor integrates with Microsoft Word, Outlook, Excel, PowerPoint, and File Explorer.

## Word

PDF Editor's integration with Word includes a print driver and ribbon.

### Print Driver

When printing, the Foxit PDF Editor driver becomes a printer option. Selecting **Foxit PhantomPDF** (version 10) or **Foxit PDF Editor Printer** (versions 11 and 12) as the printer will convert the Word document to a PDF document.

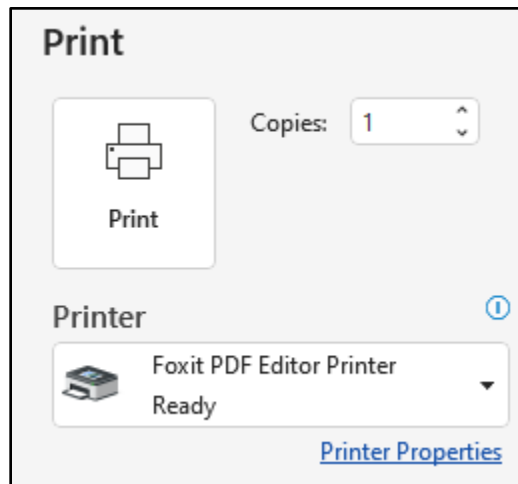


FIGURE 2-1

### Ribbon

The Foxit PDF Word ribbon includes buttons to create a PDF, create a PDF and email it, mark for redaction (Pro only), and comment.

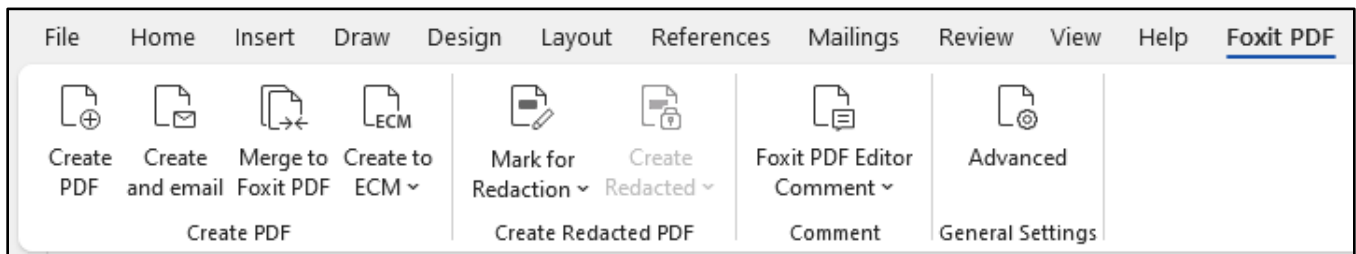


FIGURE 2-2

**Create PDF** converts the open Word document to a PDF.

**Create and email** converts the open Word document to a PDF and attaches it to a new email.

**Merge to Foxit PDF** converts mail merge templates to PDFs and attaches them to emails.

**Create to ECM** converts the open Word document to a PDF and saves into your Document Management System.

**Mark for Redaction** allows the open Word document to be marked for Redaction.

**Create Redacted** converts the open Word document to a redacted PDF. This feature is only available after the Word document has been marked for redaction.

**Foxit PDF Editor Comment** imports comments from a PDF version of the document.

**Advanced** changes the settings for the PDF creation.

## Outlook

Foxit PDF Editor's integration with Outlook includes a print driver and ribbon.

### Print Driver

When printing, the Foxit PDF driver becomes a printer option. Selecting Foxit Editor PDF as the printer will convert the email to a PDF document.

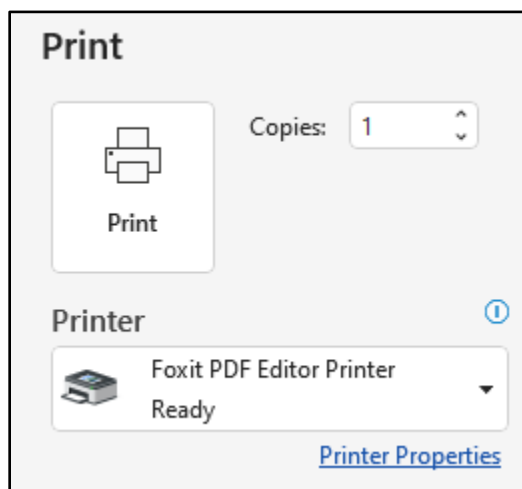


FIGURE 2-3

## Ribbon

The main window Foxit PDF Outlook ribbon is available when viewing email, calendar, people, and tasks. However, not all buttons in the ribbon are applicable to all Outlook features.

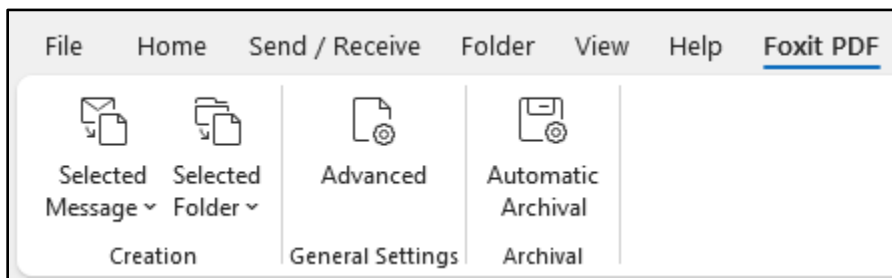


FIGURE 2-4

**Selected Message** converts the selected email message to a PDF or appends it to an existing PDF.

**Selected Folder** converts one or more folders to a PDF or appends the contents to an existing PDF.

**Advanced** changes the settings for the PDF creation.

**Automatic Archival** sets up automatic email archiving.

## Excel And PowerPoint

PDF Editor's integration with Excel and PowerPoint includes a print driver and ribbon.

When printing, the Foxit PDF driver becomes a printer option. Selecting **Foxit PhantomPDF** (version 10) or **Foxit PDF Editor Printer** (versions 11 and 12) as the printer will convert the open document to a PDF document.

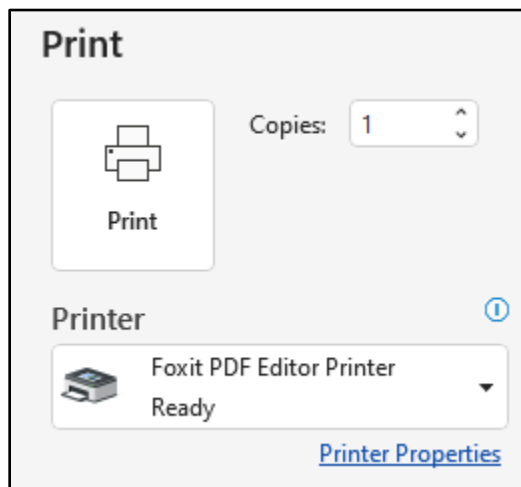


FIGURE 2-5

## Ribbon

The Foxit PDF Excel and Power Point ribbons match the Word ribbon, except that they do not include the ability to import comments.

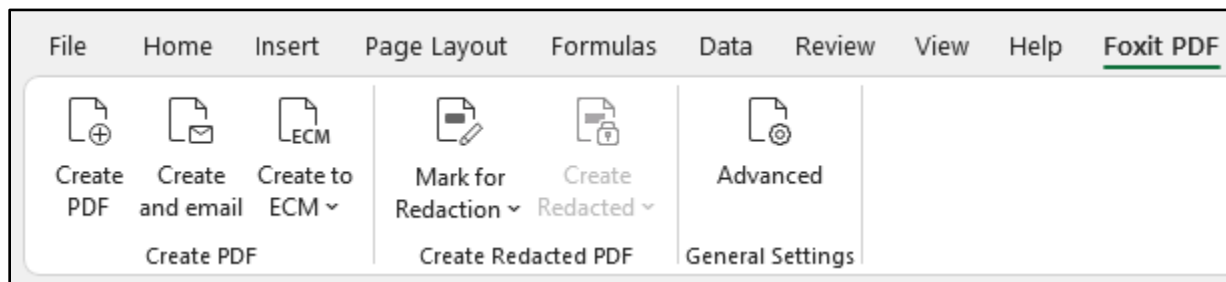


FIGURE 2-6

## File Explorer

### Conversion to PDF

The File Explorer integration allows documents to be converted to PDF files by right-clicking on then in File Explorer and selecting **Convert to PDF in Foxit PhantomPDF** (version 10) or **Convert to PDF in Foxit PDF Editor** (versions 11 and 12). If multiple files are selected at once (using CTRL or SHIFT click), they can quickly be combined into one PDF.

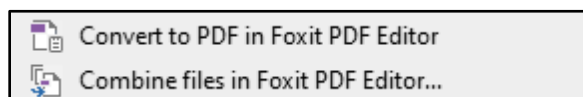


FIGURE 2-7

# CHAPTER 3

## INTERFACE

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### Main Window

The main window includes the Quick Access Toolbar, Ribbon, Navigation Pane, and Status Bar.

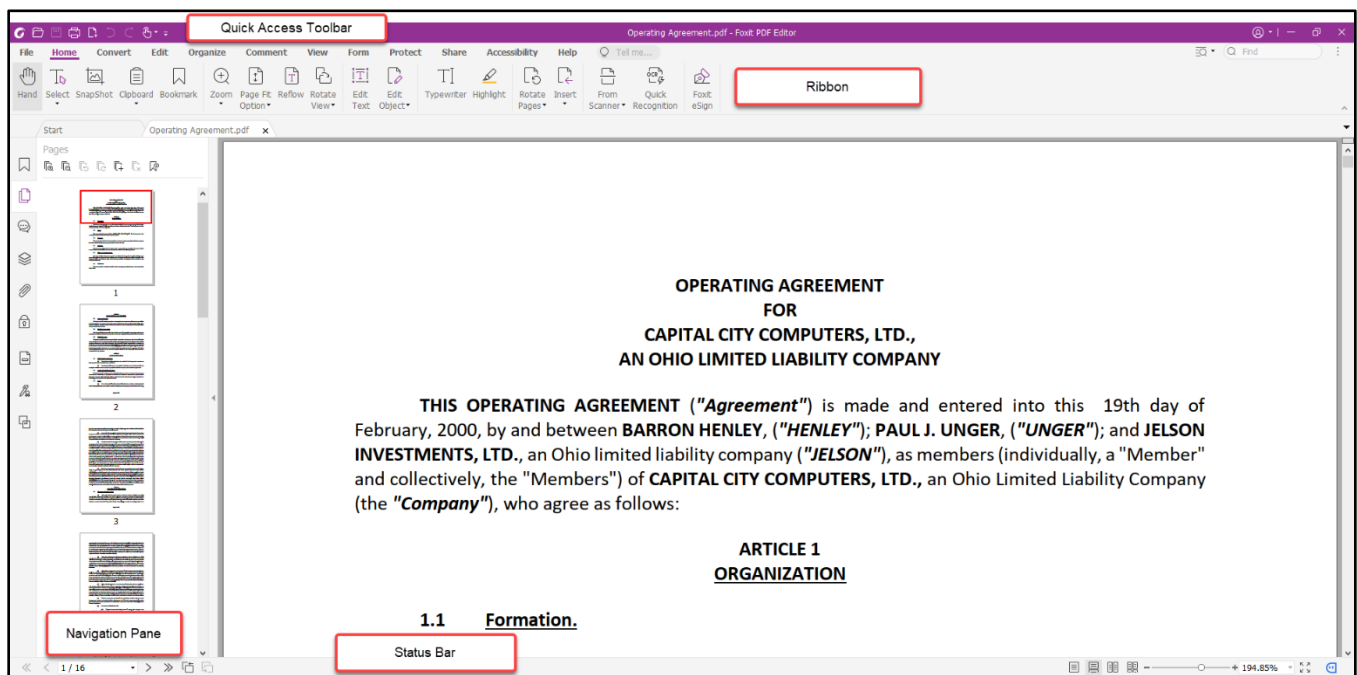


FIGURE 3-1

### Main Functionality of Each Section

- **Quick Access Toolbar:** Shortcuts.
- **Ribbon:** Access to most commonly used features.
- **Navigation Pane:** Bookmarks, pages (thumbnail view), comments, security, forms, and digital signatures.
- **Status Bar:** Quick page navigation and views.

# Quick Access Toolbar Customization

Perform a Function Frequently? Add it to your Quick Access Toolbar.

## Option 1: Right Click

If the tool to be added to the Quick Access Toolbar is available on a ribbon, right click on the tool and select **Add to Quick Access Toolbar**.

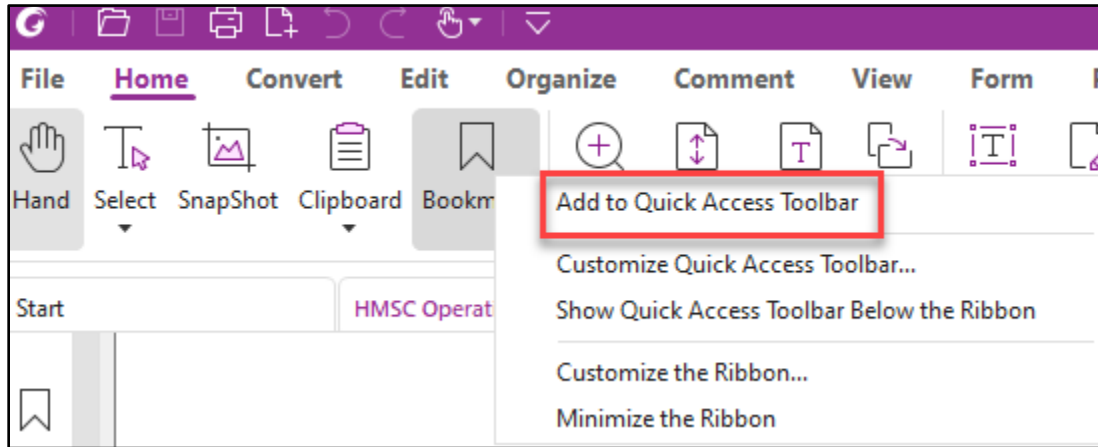


FIGURE 3-2

## Option 2: Add from the Quick Access Toolbar Drop-Down Menu

Click on the **Quick Access Toolbar drop-down** and select **More Commands...**

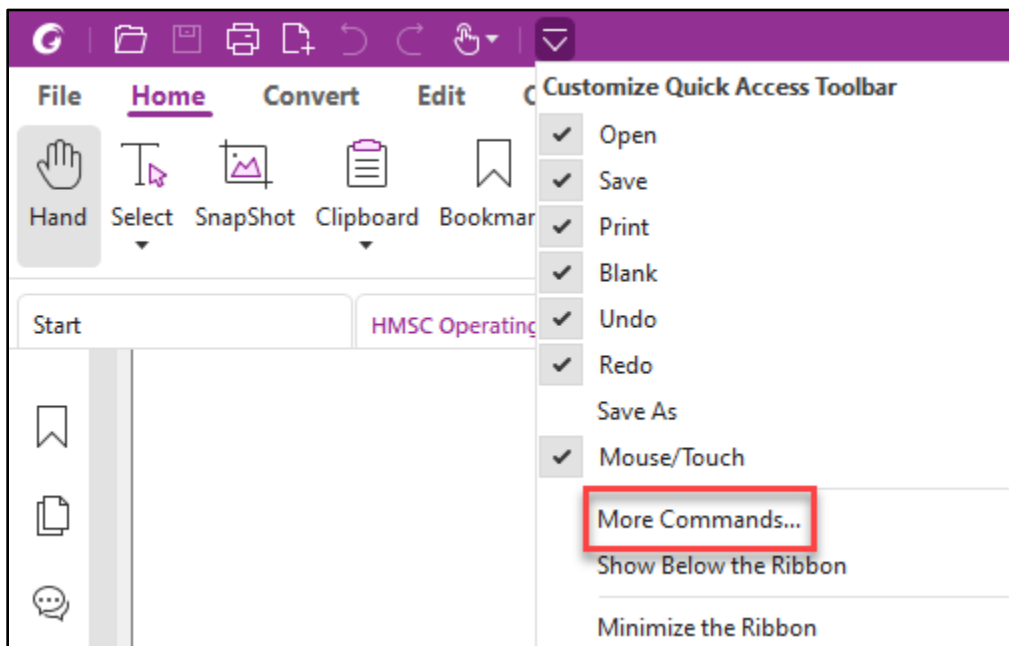


FIGURE 3-3

Choose a command and click **Add**.

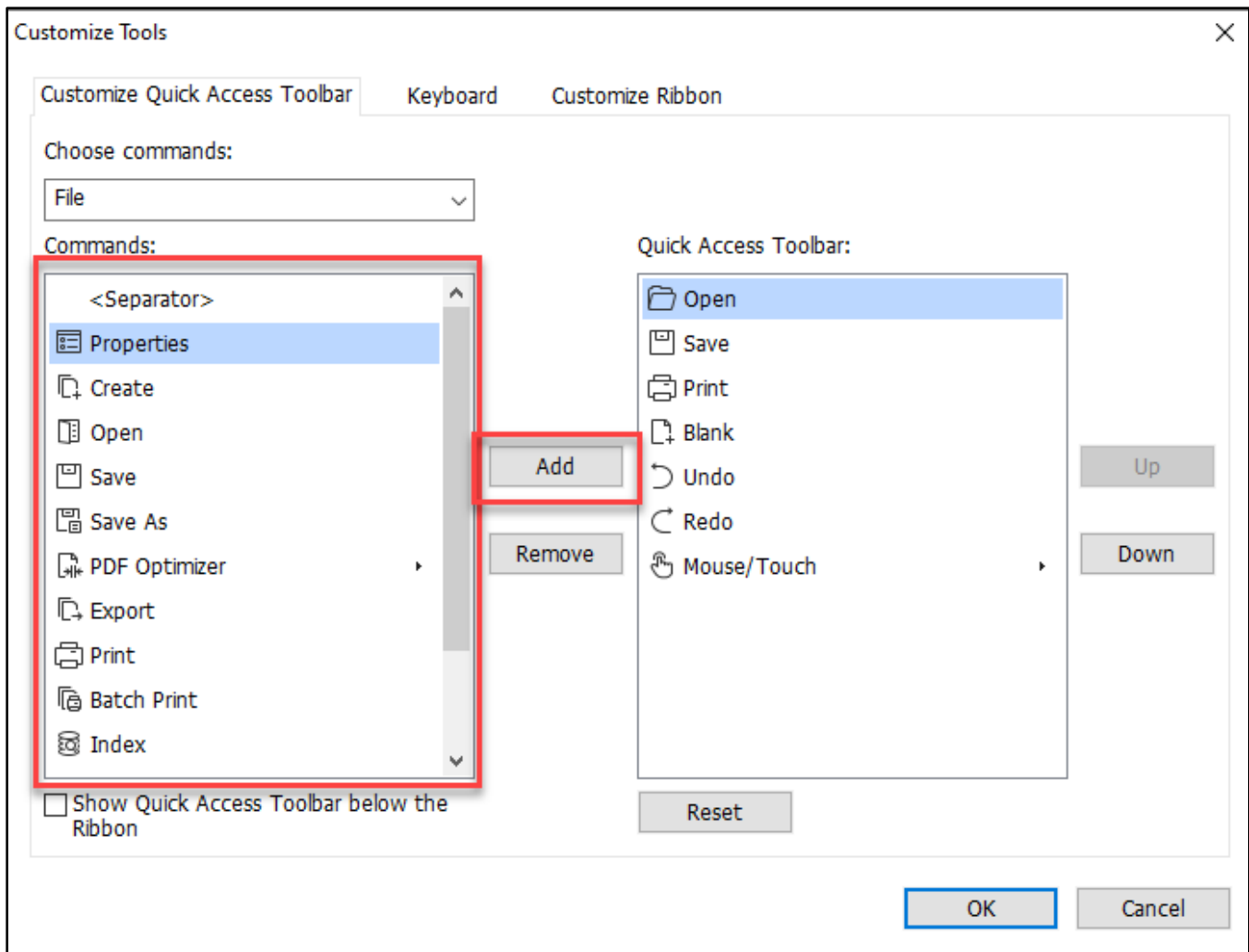


FIGURE 3-4

# CHAPTER 4

## CREATING PDFS

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### What Can Be Converted to A PDF

If you have the right hardware and software, you can create PDFs from just about anything, including electronic files (Word, WordPerfect, PowerPoint, Excel, etc.), paper documents, web pages, email, even something you've copied to your computer's clipboard.

### Creating PDFs from Microsoft Office

PDFs can be created directly from documents in Word, Excel, Outlook, or PowerPoint. There are several ways to create them, each with their own advantages and disadvantages.

#### Foxit PDF Ribbon (Word)

A Word document can be converted a pdf by clicking on the **Create PDF button** on the **Foxit PDF ribbon**.

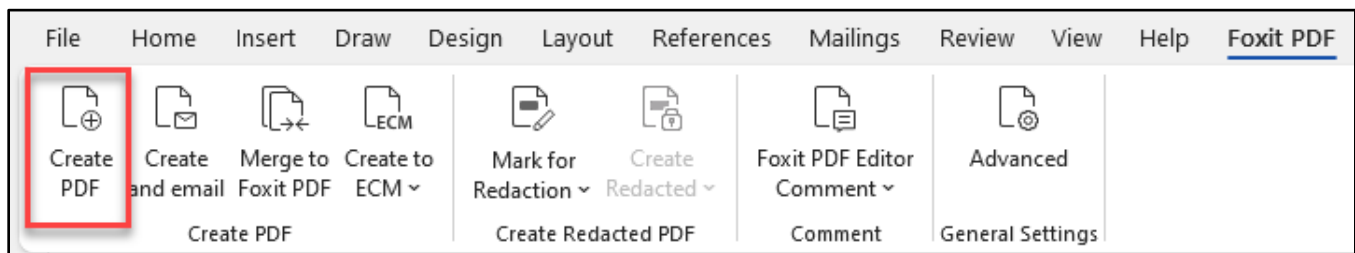


FIGURE 4-1

PDF Editor will open an **Add-in window**. Select the appropriate location to save the PDF, and rename the PDF file, if needed.

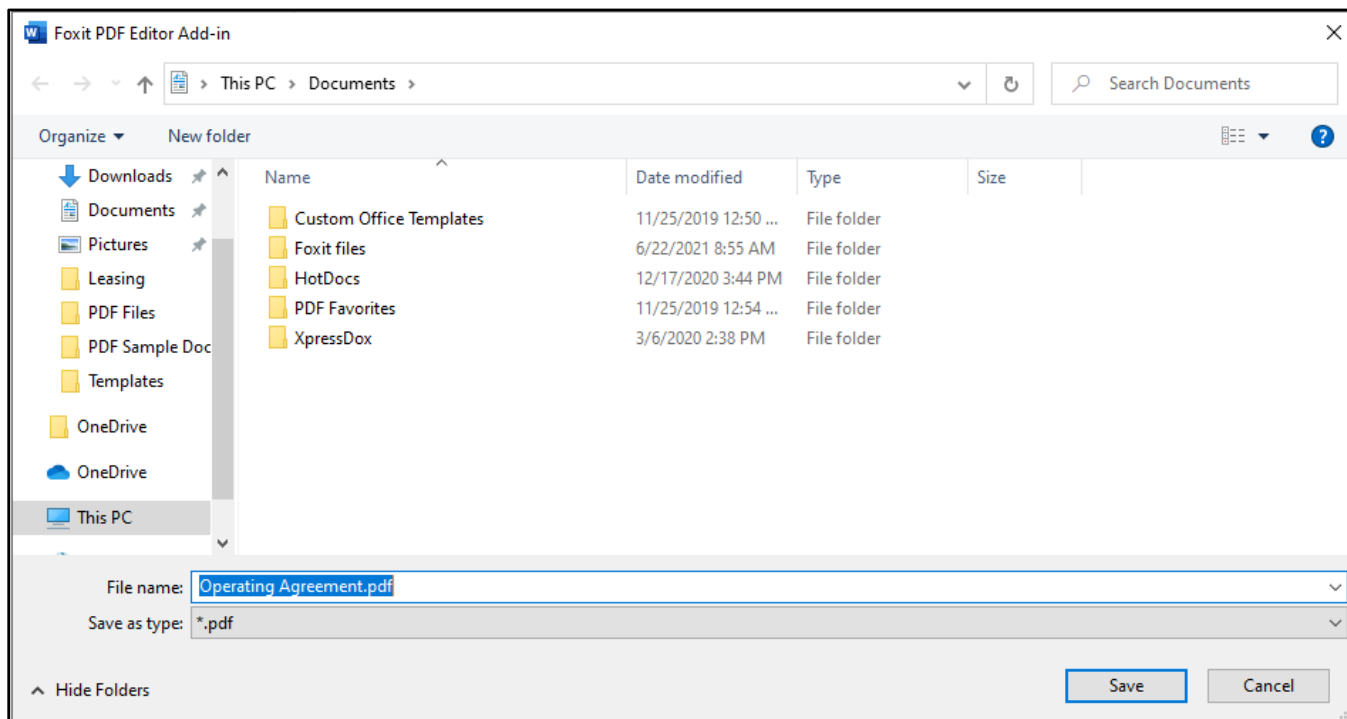


FIGURE 4-2

To change PDF creation settings, such as the creation of bookmarks, the **Advanced Settings button** must be clicked *prior* to clicking the **Create PDF button**.

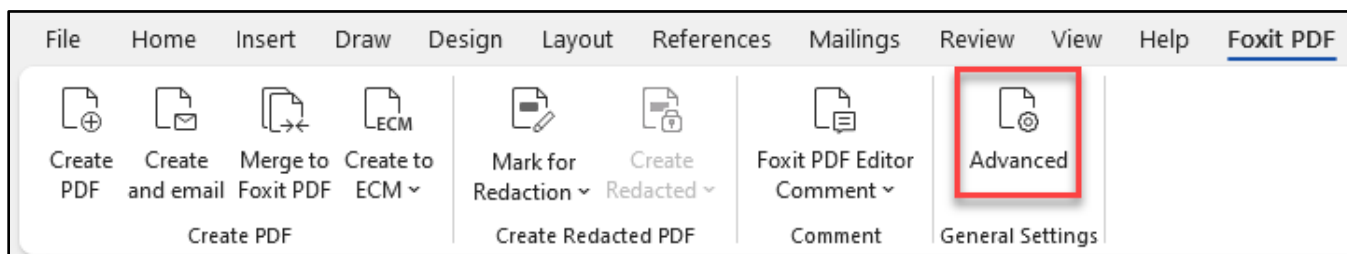


FIGURE 4-3

**Bookmarks:** Bookmarks can be created based on the heading styles, non-heading styles (these appear at the bottom of the styles list after the heading styles), and bookmarks added to the Word document. To add bookmarks for only some heading styles, check the boxes for the desired heading styles only. Checking the **Convert Word headings to bookmarks box** will automatically check all heading styles. Heading styles can be easily unchecked in the list below.

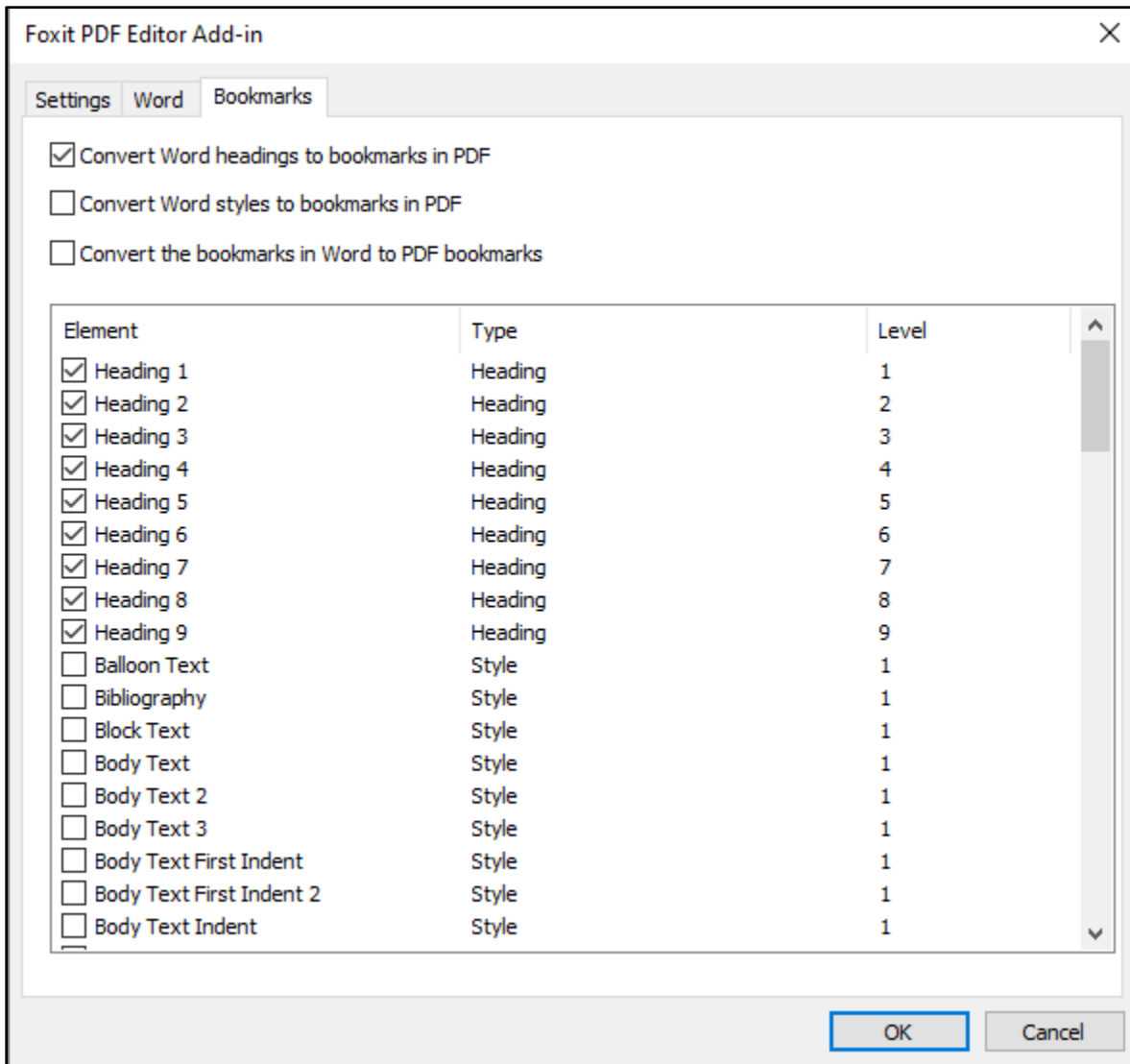


FIGURE 4-4

## Export As PDF (Word, Excel and PowerPoint)

A PDF can be created from the **File menu** in Word by clicking on the **Export button** and then selecting **Create PDF/XPS Document**.

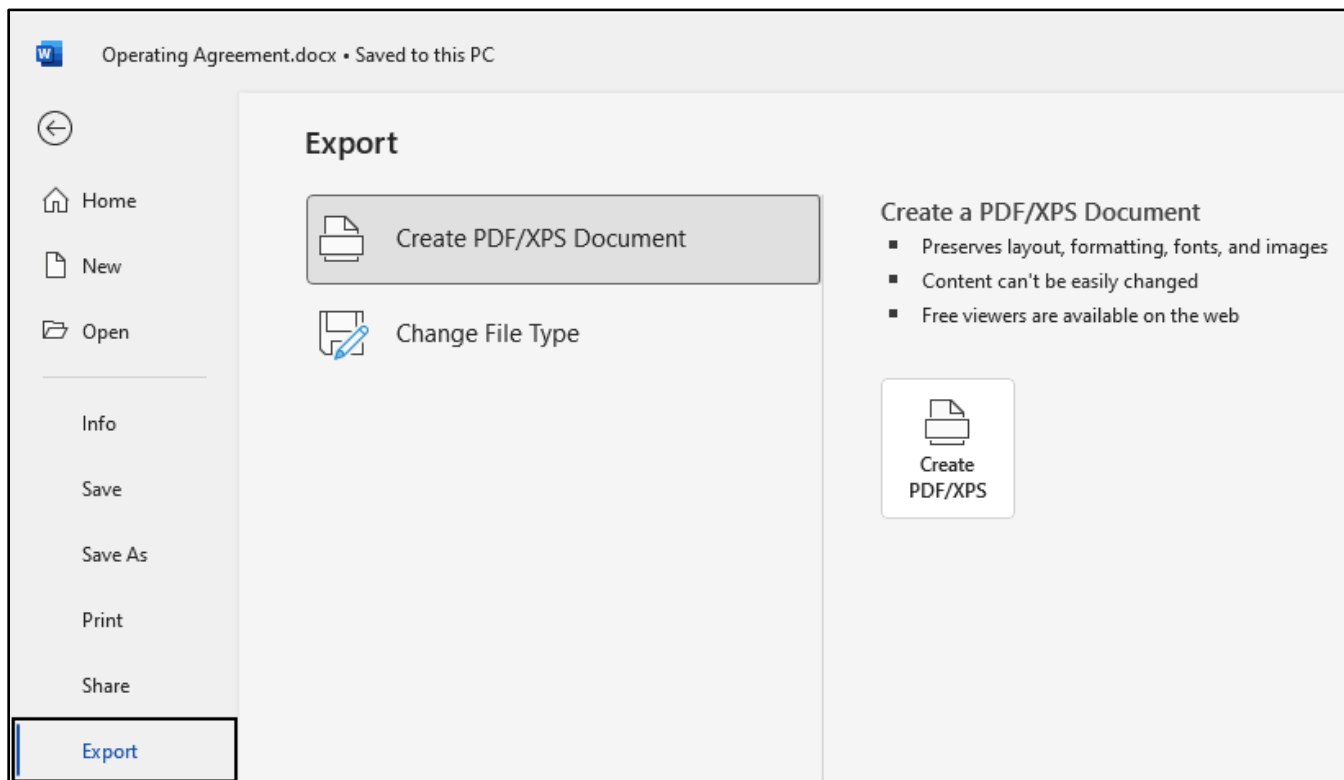


FIGURE 4-5

This will open a **Publish as PDF or XPS dialog**. The default settings are fine for a typical legal document. However, to create bookmarks in the PDF, make the PDF conform to PDF/A

standards, or to export only part of the document as a PDF file, click on the **Options** button and select the appropriate options.

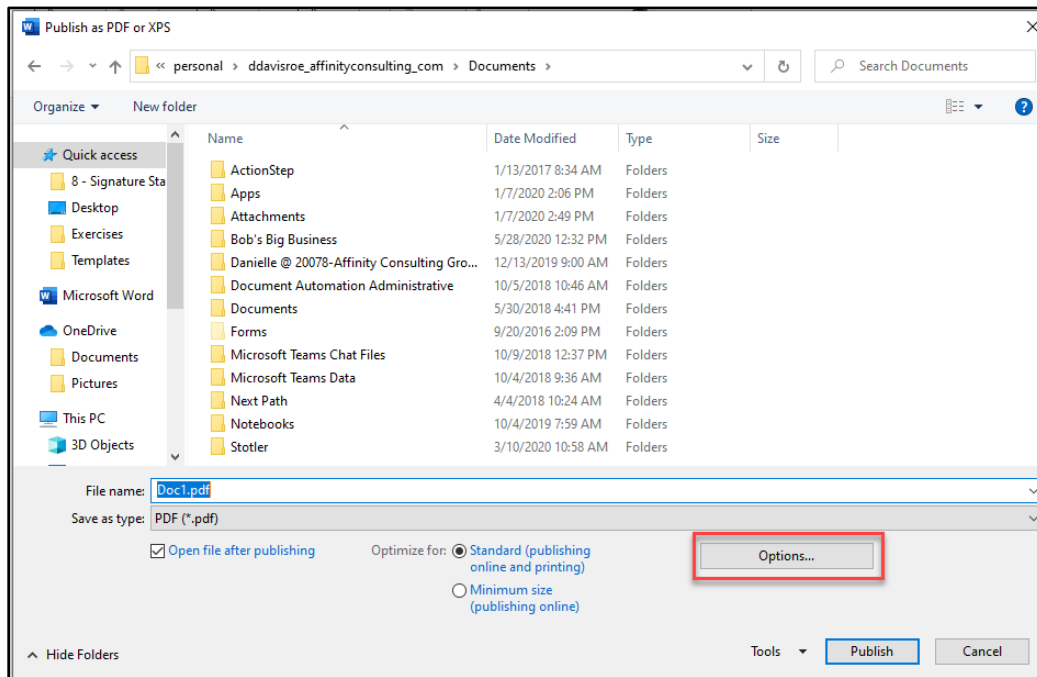


FIGURE 4-6

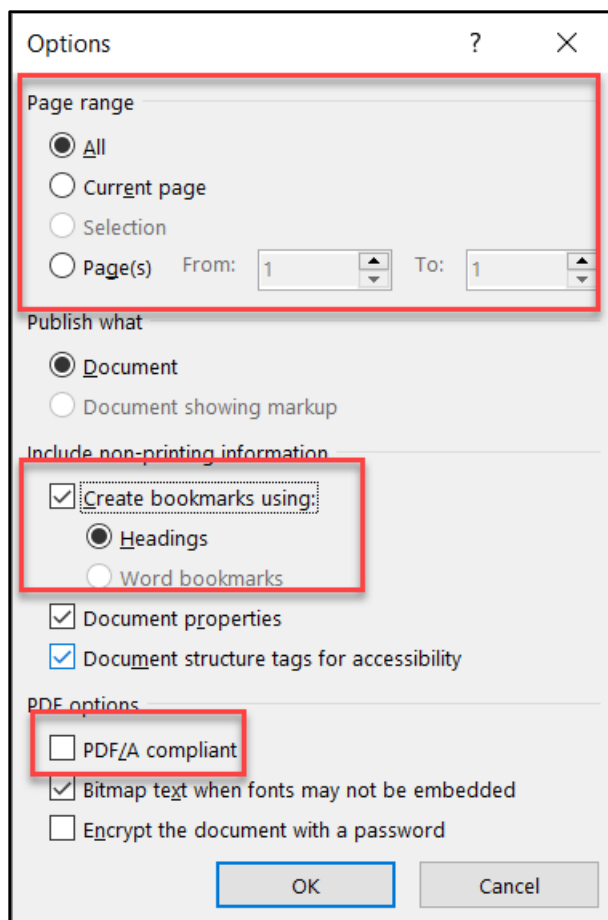


FIGURE 4-7

## Print Drivers (Word, Outlook, Excel, and PowerPoint)

A PDF can also be created from any Office product by using PDF Editor's print driver or Microsoft's PDF print driver by clicking on the **File** menu and select either **Microsoft Print to PDF**, **Foxit PhantomPDF** (version 10), or **Foxit PDF Editor Printer** (versions 11 and 12) from the list of **Printers**.

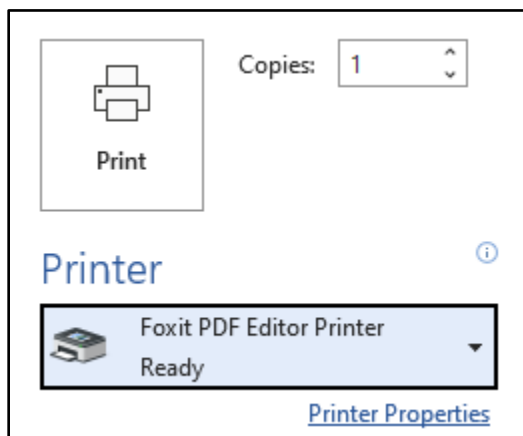


FIGURE 4-8

The **Microsoft Print to PDF driver** will open a **Save Print Output As dialog** where the PDF can be named. The **Foxit PDF driver** will open the same **Save As dialog** as the **Foxit PDF ribbon**.

## Creating PDFs from Individual Emails or Entire Folders (Outlook)

Select individual emails (Ctrl + left-click) or select entire folders; then click the **Selected Message** or **Selected Folder button** on the **Foxit PDF ribbon**.

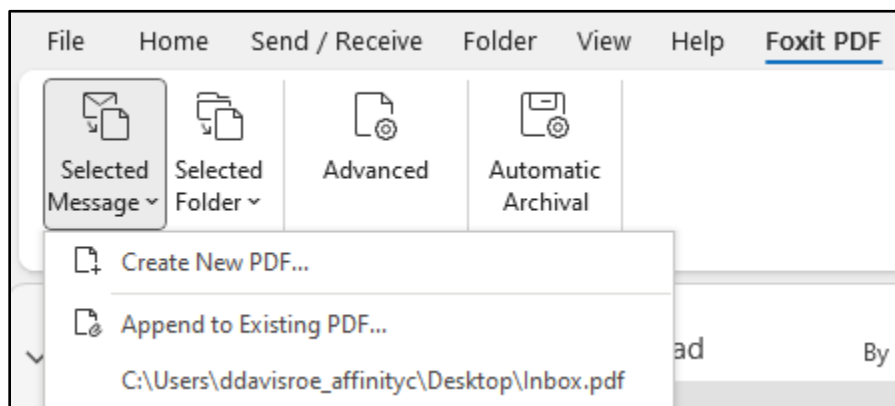


FIGURE 4-9

To create a PDF portfolio (see Chapter Chapter 10) of the emails, click on **Advanced** and check the **Output PDF Portfolio box**.

To include the email attachments as attachments to the PDF, click on **Advanced** and check the **Include Attachment box**.

## Creating PDFs from PDF Editor

Convert one or more existing files into PDFs by clicking on **File**, then **Create**, then **From File** or **From Multiple Files**, then **From File** or **From Multiple Files**.

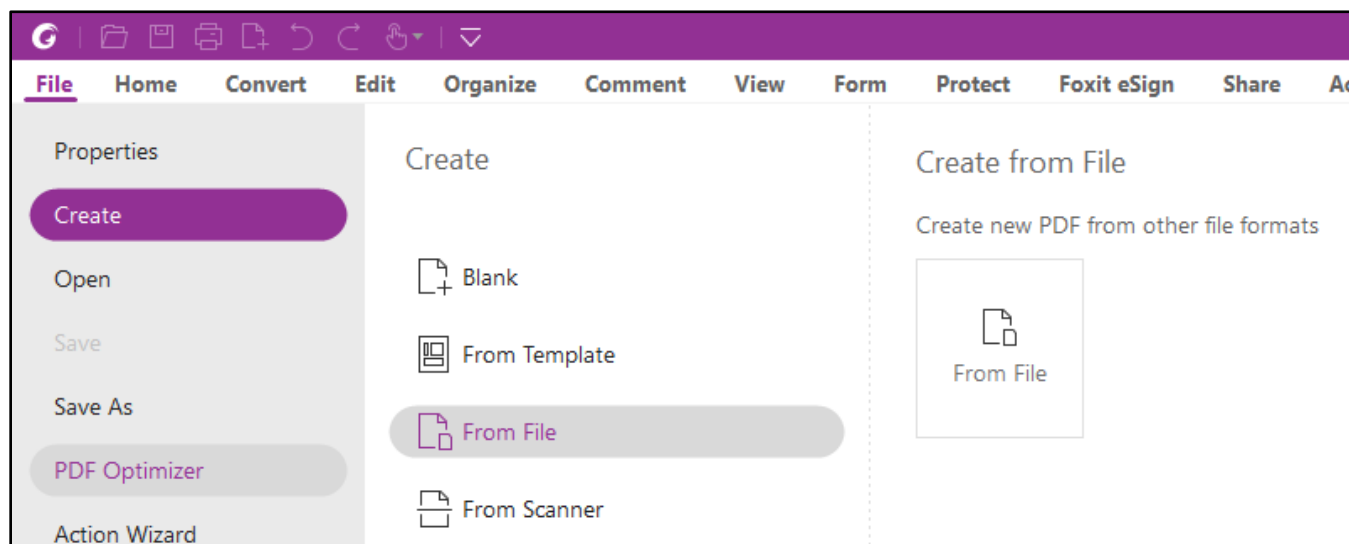


FIGURE 4-10

Select the file(s) to be converted and click **Open**. The PDF will open after a brief conversion process.

## Creating PDFs from Scanners

If you have a TWAIN or WIA compliant scanner connected to your computer, then you can create PDFs from paper documents from the **File menu**, by selecting **Create**, and clicking on **From Scanner**.

# CHAPTER 5

## VIEWING PDFS

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There are several settings that can be changed to improve the PDF viewing experience.

### Read Mode

Change to Read Mode using the **View ribbon's Read Mode button**. Read mode hides the ribbon, navigation pane, and status bar. This is often helpful to use during presentations, so you can hide busy and distracting toolbars. Press the Escape key or toggle Read Mode off using the same **Read Mode button** on the **View ribbon** to return to the main screen.

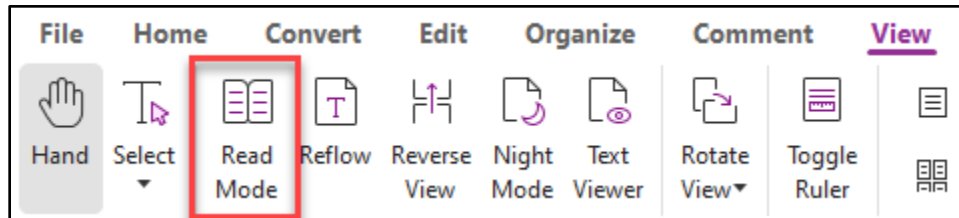


FIGURE 5-1

### Read Out Loud

If the PDF is text based or the text has been recognized, PDF Editor can read the PDF using a built in speech synthesizer. Start the read aloud by clicking on **View ribbon**, click on the **Read button**, and select **Activate Read**.

Click on the **Read button** again and select **Read Current Page** to have read aloud the current page or **Read From Current Page** to have read aloud from the current page to the end of the document.

In version 10, use the **Rate and Volume buttons** to control the speed and volume at which the PDF is read.

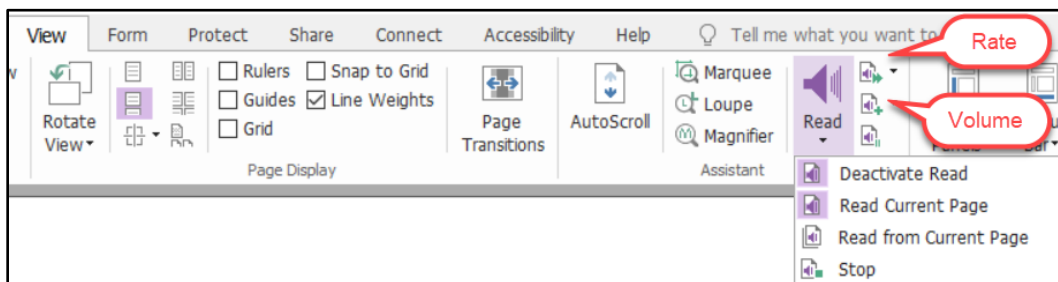


FIGURE 5-2

In version 11, click on the **Read button** to control the speed and volume at which the PDF is read.

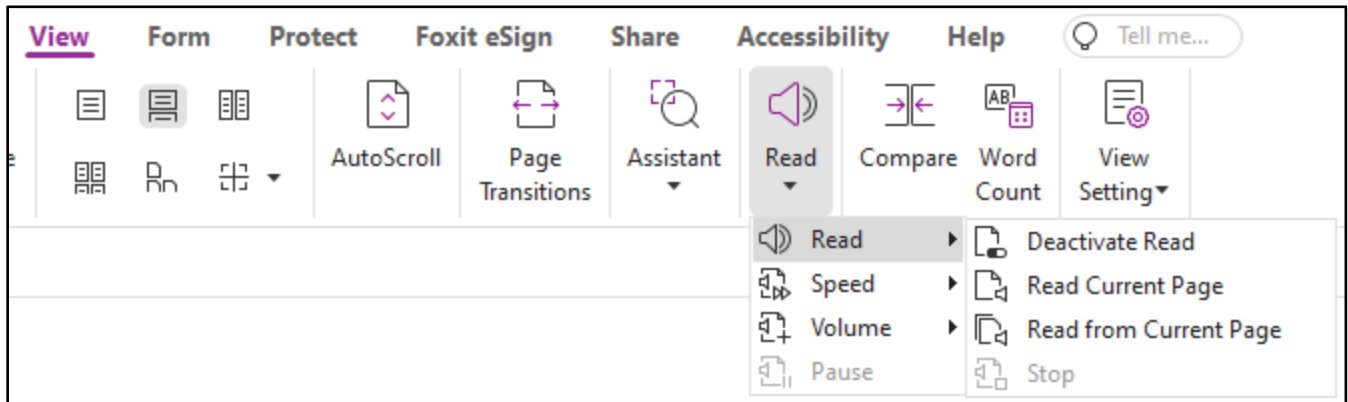


FIGURE 5-3

## Tabs

In PDF Editor, PDFs are opened by default in new tabs in the same window. To automatically open each PDF in its own window, go to **File, Preferences**, click on **Documents**, and then check the box for **Allow multiple instances**.

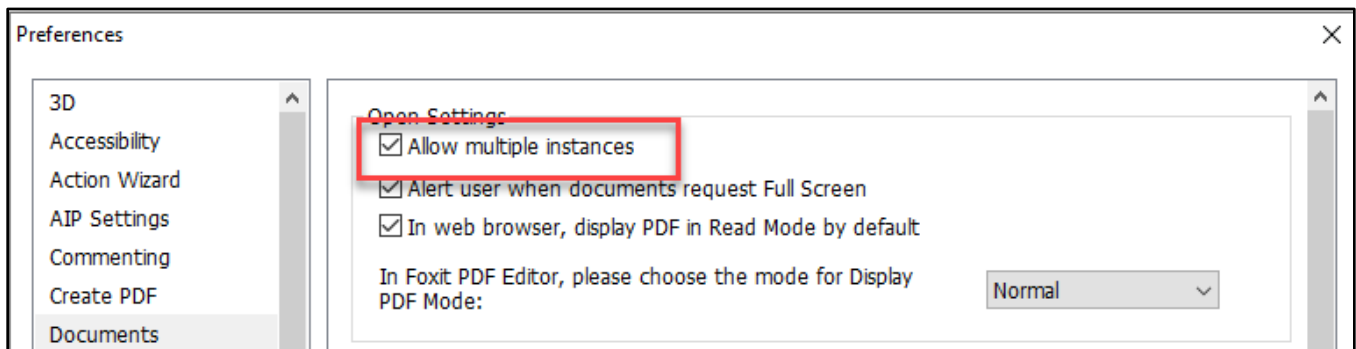


FIGURE 5-4

# CHAPTER 6

## CREATING A TEXT-SEARCHABLE PDF

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### Convert an Image-Only PDF to a Text-Searchable PDF

Many copier/scanners create image-only PDFs. You cannot search for particular words inside the PDF when it is image only. However, you can convert those images into searchable PDFs with a few easy steps.

First, open the PDF you want to make searchable.

In version 10, select **Home** ➔ **Convert (group)** ➔ **Quick OCR**. You will be prompted to save the PDF if it has not already been saved.

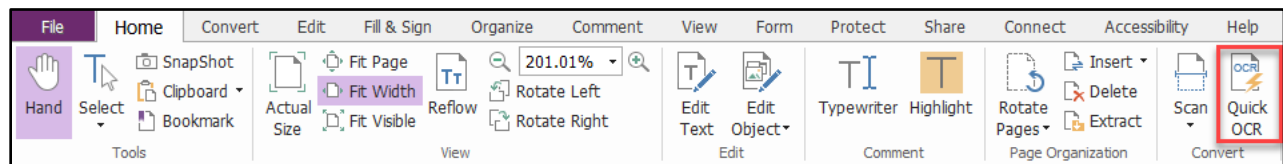


FIGURE 6-1

In versions 11 and 12, select **Home** ➔ **Quick Recognition**. You will be prompted to save the PDF if it has not already been saved.

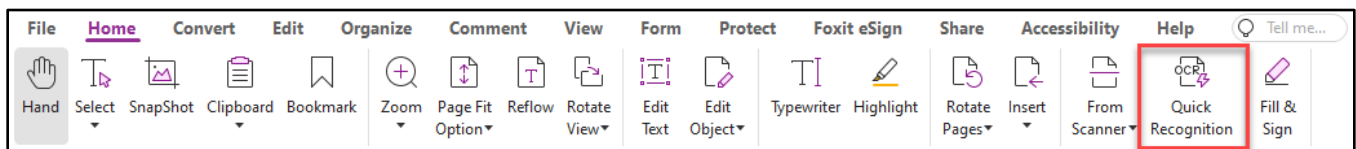


FIGURE 6-2

### Batch Process to Text Searchable PDFs

Convert multiple image only PDFs to text searchable PDFs by batch processing them.

In version 10, on the **Convert ribbon**, click on the **OCR button**, and then click on **Multiple Files**.

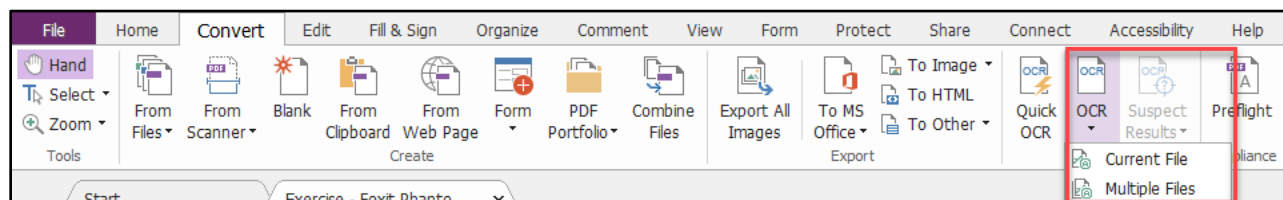


FIGURE 6-3

In versions 11 and 12, on the **Convert ribbon**, click on the **Recognize Text button**, and then click on **Multiple Files**.

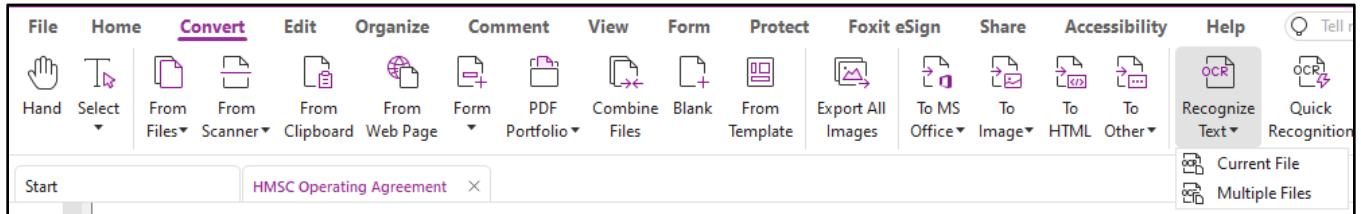


FIGURE 6-4

1. Click on the **Add Files button** and choose **Add Files** to select individual PDFs, **Add Folder** to select an entire folder of PDFs, or **Add Open Files...** to select the currently open PDFs.

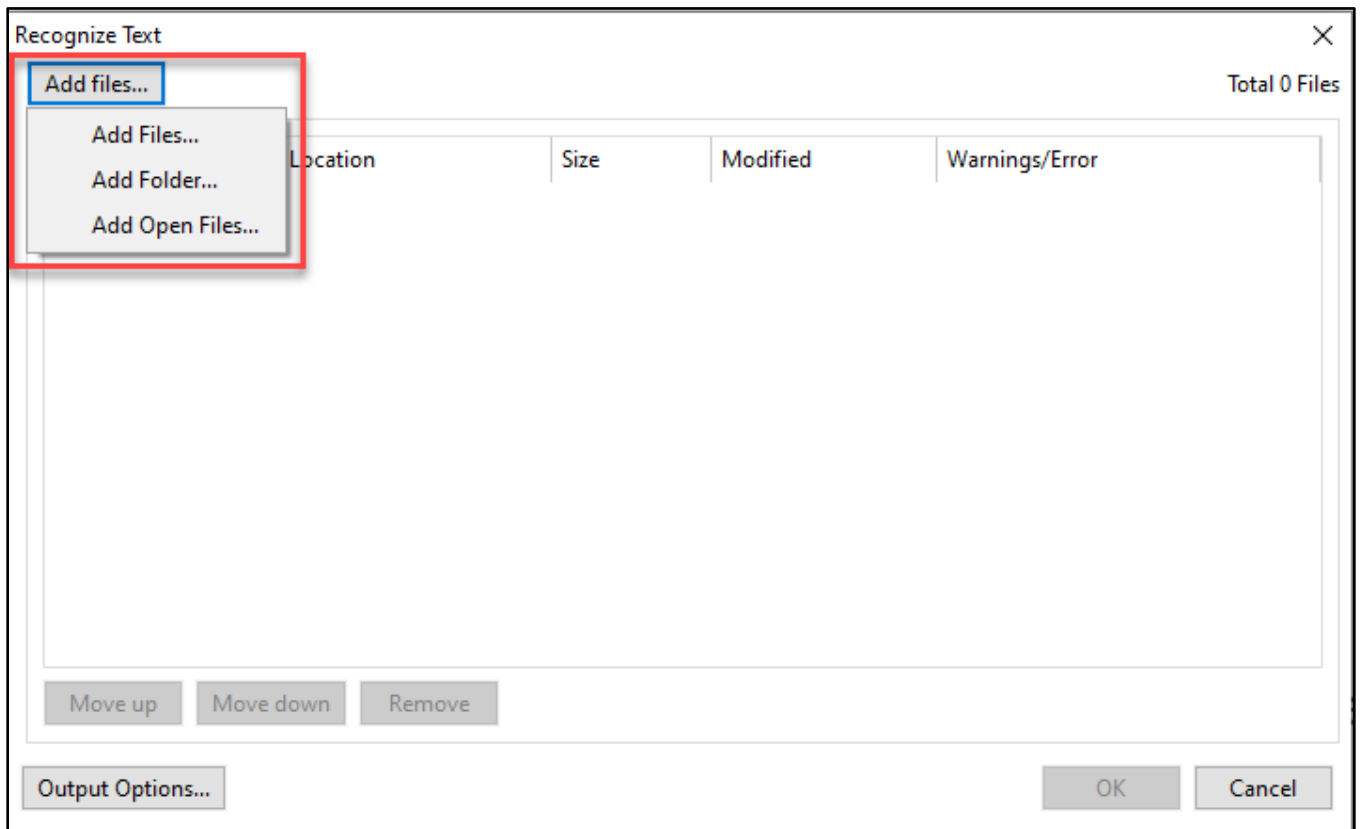


FIGURE 6-5

2. Click on the **Output Options button...** to control whether the existing files are overwritten or where the new files should be saved and named.

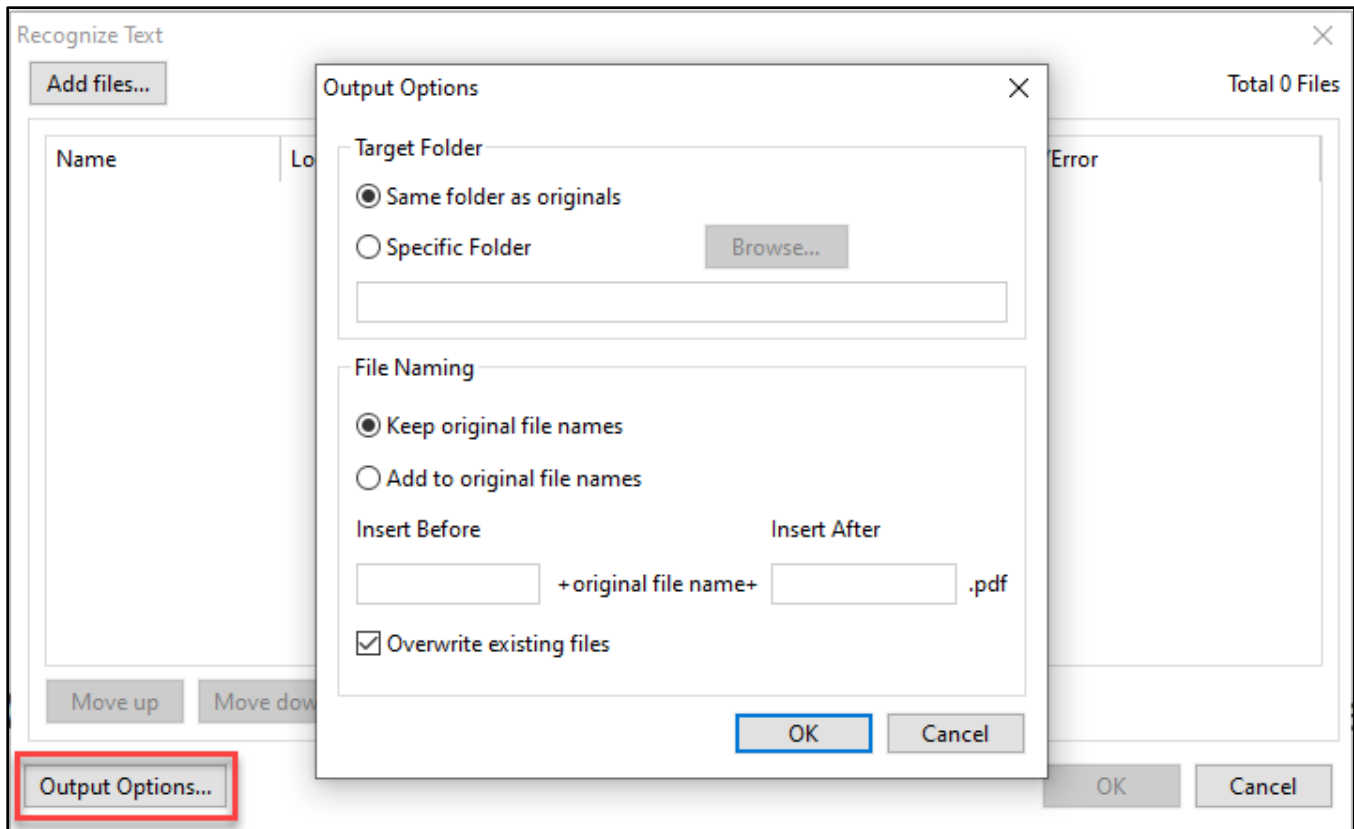


FIGURE 6-6

3. Click **OK**.
4. Click **OK**.
5. To be able to edit or copy the text after processing, select **Editable Text**.

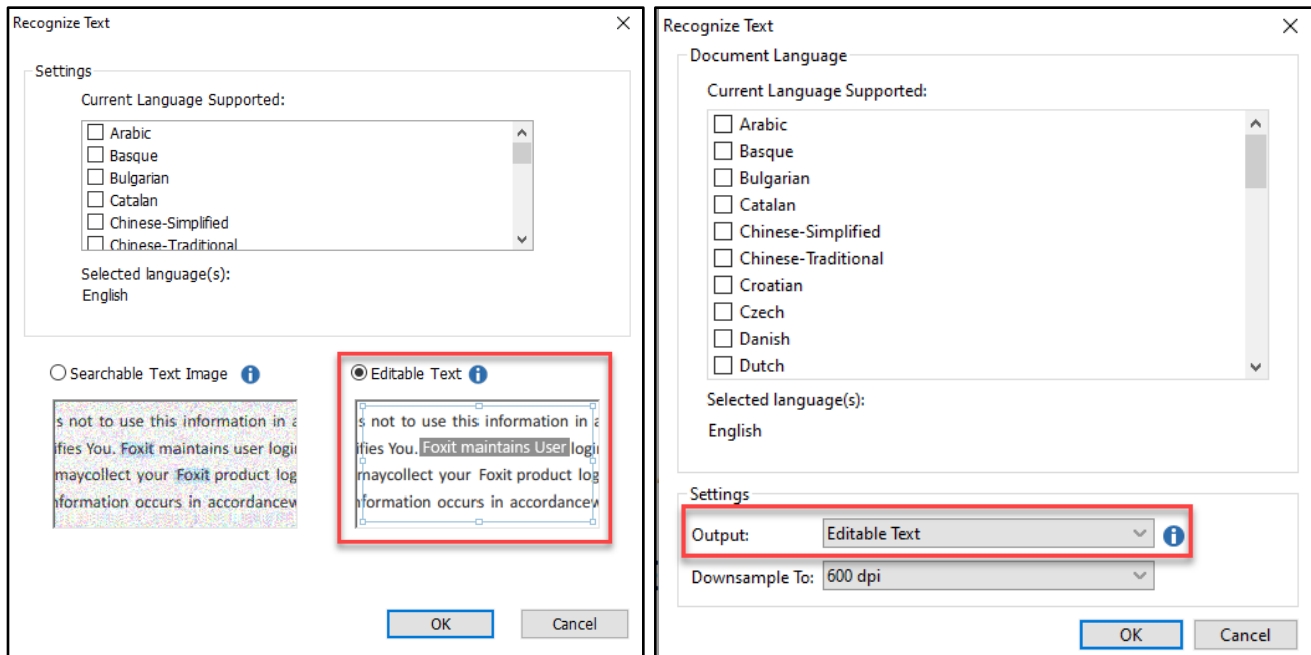


FIGURE 6-7

6. Click **OK**.

# CHAPTER 7

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### PDF Must Be Searchable in Order to Copy Text

In order to copy text from a PDF, the PDF must not be secured or locked down and it must be a searchable PDF.

### Copy Text from a PDF and Insert into Word Processor

If the PDF is searchable and not otherwise secured, on the **Home ribbon**, click on the **Select button**.

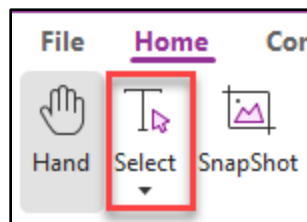


FIGURE 7-1

Select text by holding down on the left mouse button and dragging. Once the text is selected, you can copy it by right clicking and selecting **Copy** or on the **Home ribbon**, click on the **Clipboard button**, and select **Copy**, then you can go into a Word document and Paste.

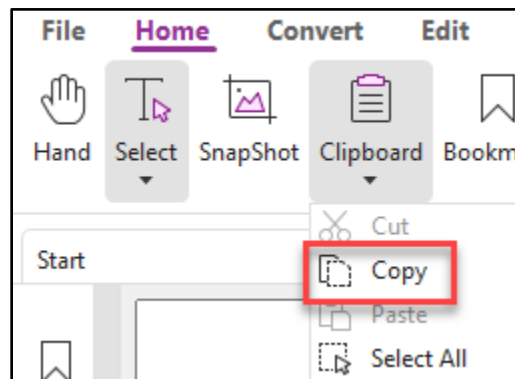


FIGURE 7-2

## Convert PDF to Word Processor Document

To convert the PDF to a Word document, on the **Convert ribbon**, click on the **To MS Office** button, and select **To Word**.

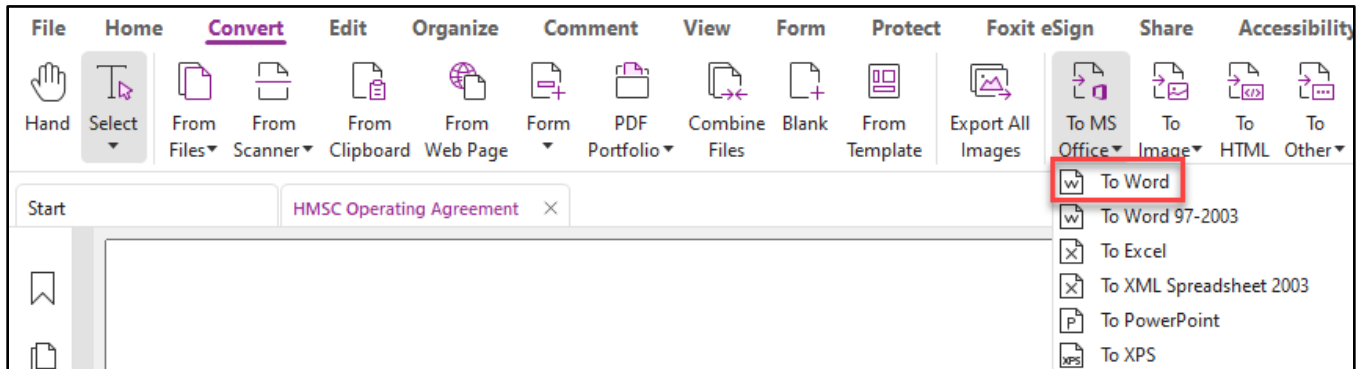


FIGURE 7-3

# CHAPTER 8

## EXTRACTING PAGES

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If you need to create a new PDF with some of the pages of an existing PDF, you need to extract those pages. There are two primary methods of extracting pages from existing PDFs. They can either be extracted using the **Extract button** on the **Home ribbon** or from the **Thumbnail view**

### Extract Button

In version 10:

1. Click the **Extract button** in the **Page Organization group** on the **Home ribbon**.

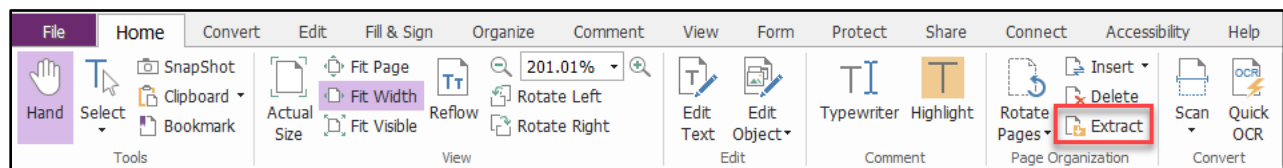


FIGURE 8-1

2. Choose the page range to extract and decide whether to delete the extracted pages from the original PDF.
3. Click **OK**. Note that the extracted pages are not automatically saved so don't forget to save the new file before you exit.

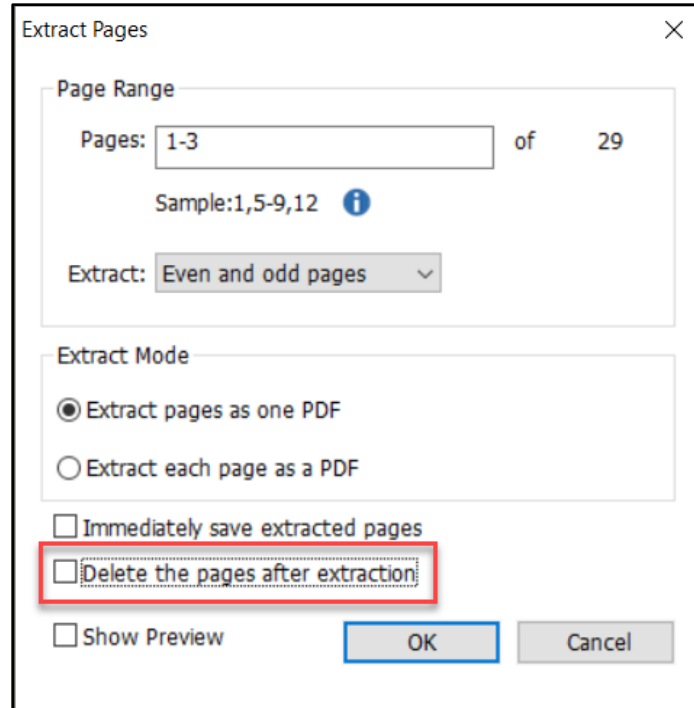


FIGURE 8-2

In versions 11 and 12:

1. On the **Organize ribbon**, click on the **Extract button**.

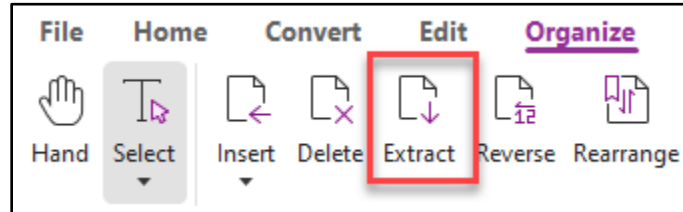


FIGURE 8-3

2. Choose the page range to extract and decide whether to delete the extracted pages from the original PDF.
3. Click **OK**. Note that the extracted pages are not automatically saved so don't forget to save the new file before you exit.

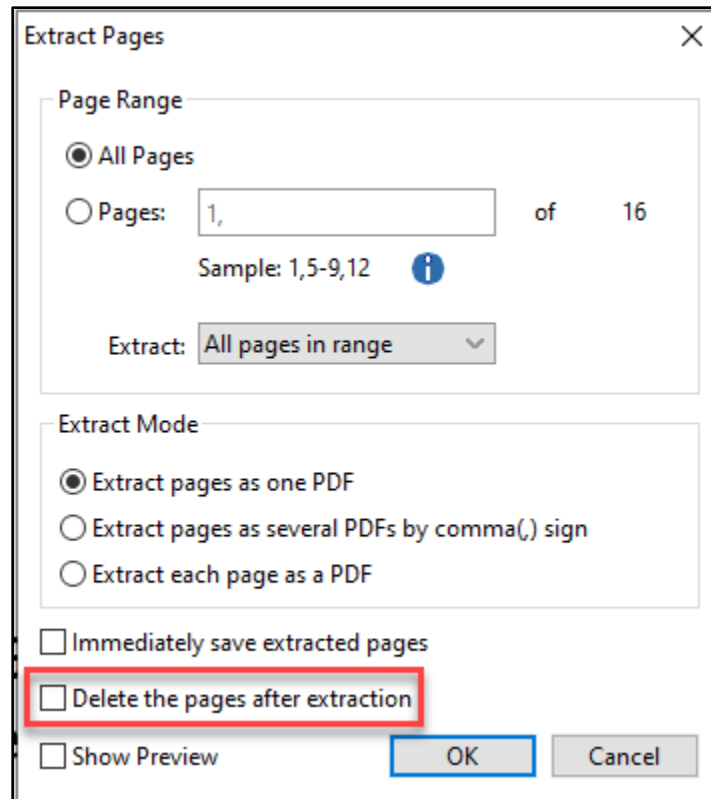


FIGURE 8-4

## Thumbnail Method

1. Turn on the **Thumbnail view** by clicking on the thumbnail icon located in the **Navigation Pane** on the left.
2. Select the pages to be extracted. (Hold down the **Shift** to select a range of pages or the **Ctrl** key to select multiple individual pages.)
3. Right click and **Extract Pages**.

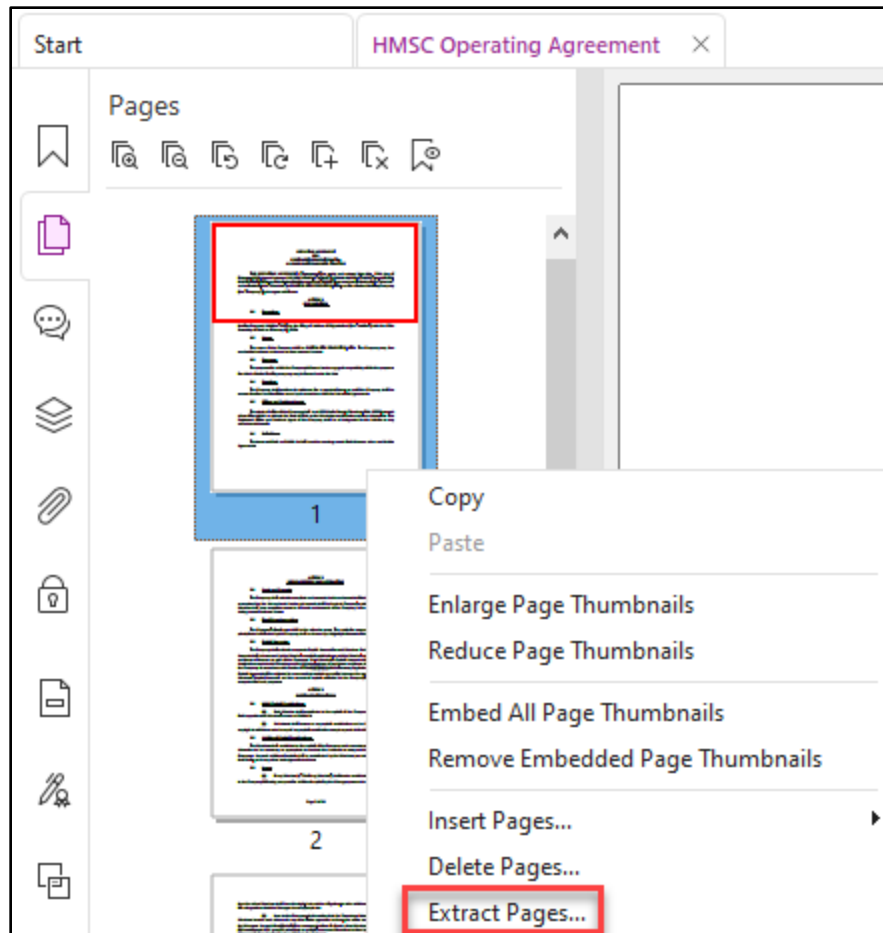


FIGURE 8-5

# CHAPTER 9

## COMBINING PDFS

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There are several ways to combine entire PDFs or portions of PDFs.

### Thumbnail View

The Thumbnail View makes it easy to drag and drop to combine. It does not, however, automatically create bookmarks for the first page of each combined PDF.

### Insert Entire PDF

This only works if tabs are turned off (see page 19).

1. Open the destination PDF and turn on the **Thumbnail view** by clicking on the thumbnail icon located in the **Navigation Pane** on the left.
2. Drag and drop the whole PDF file into the desired page position found in the thumbnail view of the open PDF.

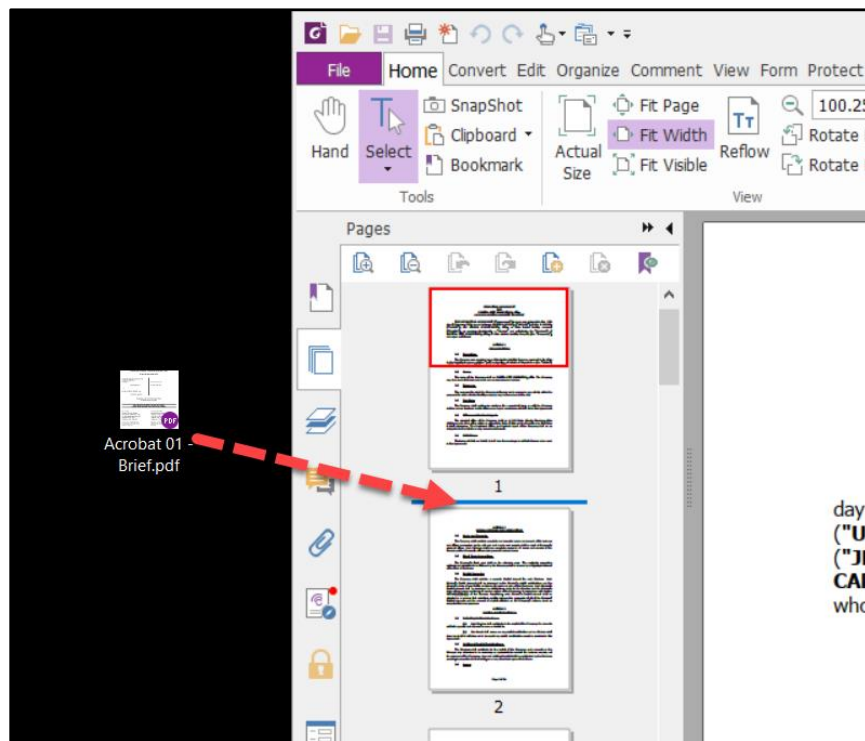


FIGURE 9-1

## Insert Pages

This works if tabs are turned off (see page 19) or each PDF is manually opened in its own window.

1. Open both PDFs side by side and turn on the **Thumbnail view**. If you have dual monitors, open one pdf on each monitor. If you only have one monitor, use the **Windows key** and **right and left arrow keys** to "snap" the PDFs side by side on your monitor.
2. Select the page(s) to be inserted (use **Ctrl** or **Shift** to select multiple pages).
3. Drag and drop the **pages** from one PDF to another.

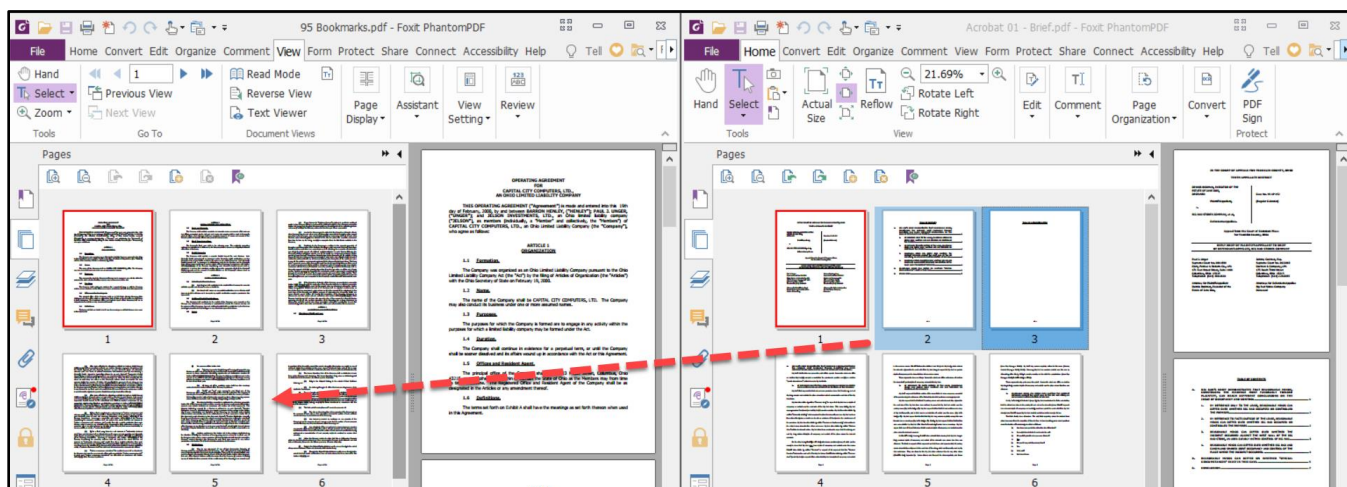


FIGURE 9-2

## Insert Button

The Insert button makes it to insert pages of multiple PDF files at once. It does not create bookmarks for the first page of each combined PDF.

1. On the **Home ribbon**, click on **Insert**, then **From File**.

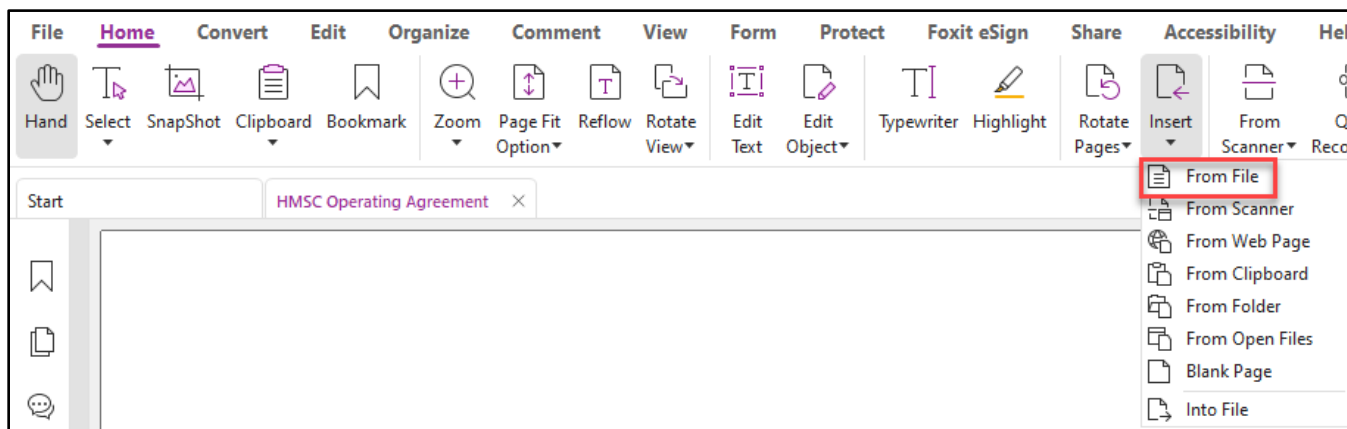


FIGURE 9-3

2. Select the file with the pages to be inserted.
3. Select the pages to be inserted (the source pages) and where to insert them.
4. Repeat for additional files if necessary.

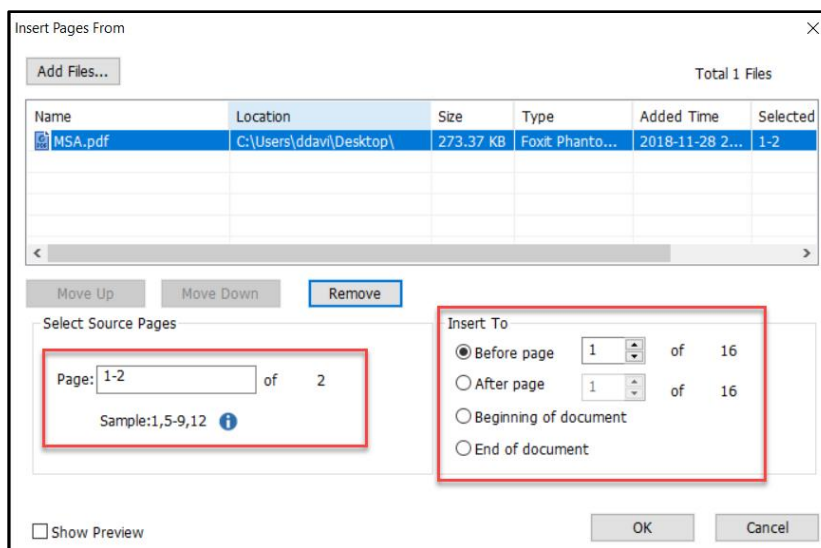


FIGURE 9-4

## Combine Files Button

The Combine Files button makes it easy to combine multiple PDFs and automatically creates bookmarks for the first page of each combined PDF.

1. Open one of the existing PDFs to be combined.
2. From the **Convert** ribbon, select **Combine Files**.

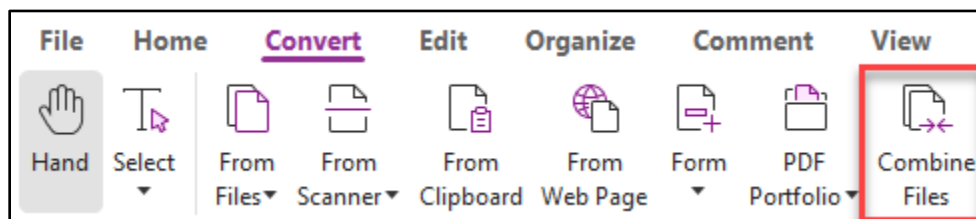


FIGURE 9-5

3. In version 10, click on **Add Files** and then **Add Files**.

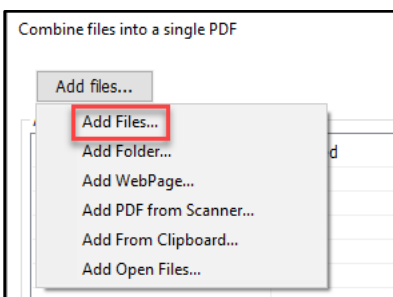


FIGURE 9-6

In version 11 or 12, click on **Add Files**.

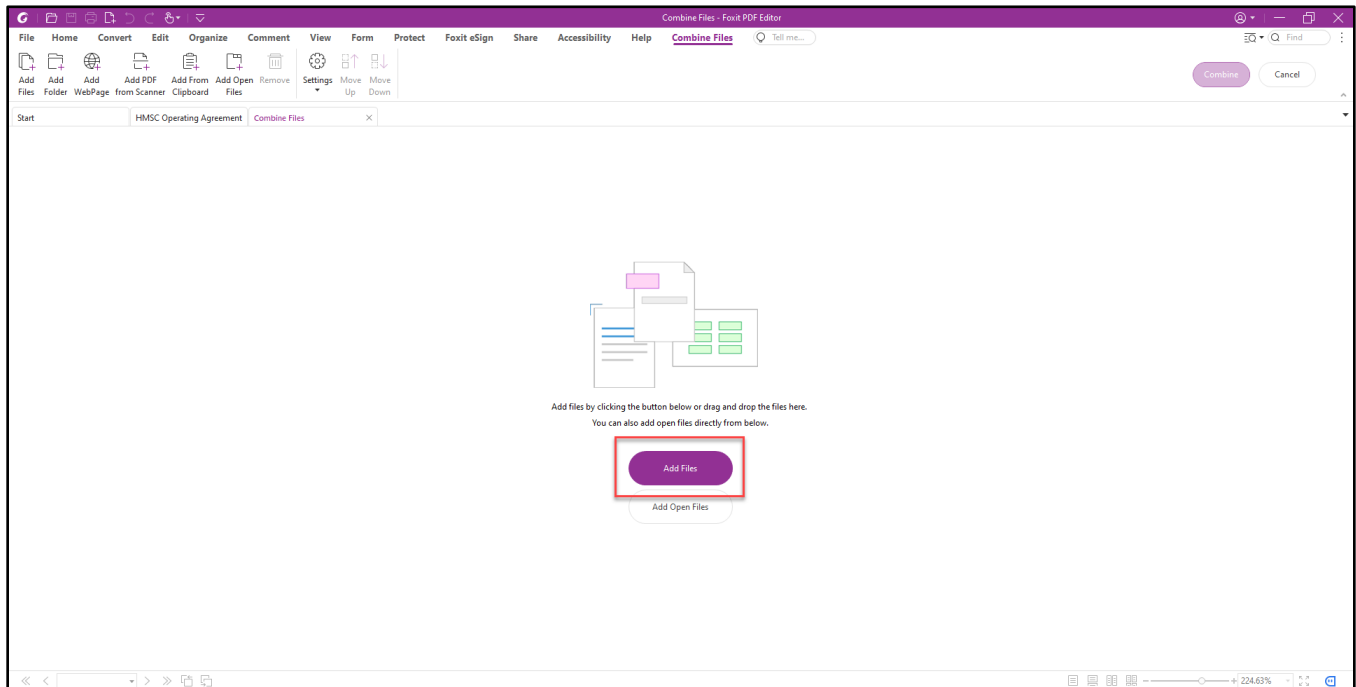


FIGURE 9-7

4. Select the desired files and click **Open**. The selected files will be added to the list.
5. To insert specific pages (rather than all pages) from the PDF, click on the **Choose Pages** button.

Version 10:

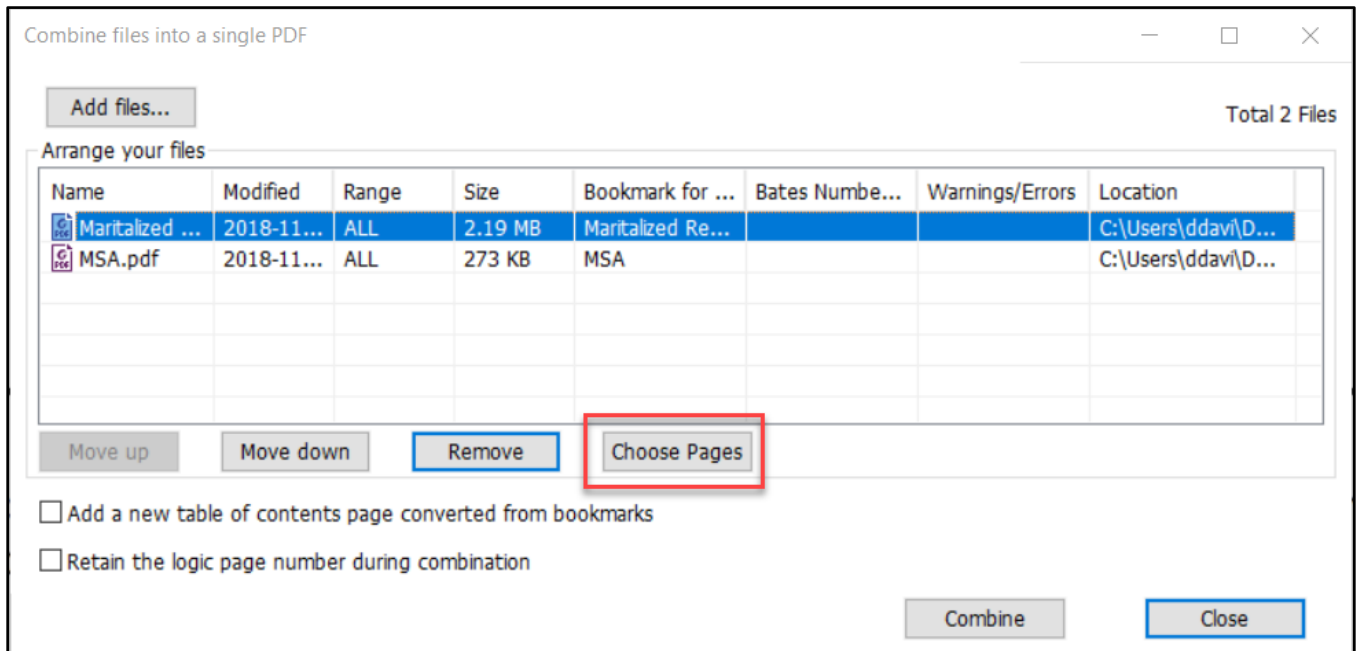


FIGURE 9-8

Versions 11 and 12:

Name	Operation	Modified	Page Range	Size	Bookmark for File
▶  Operating Agreement.pdf	<b>Choose Pages</b>	2021-10-21 14:17:29	ALL	292 KB	Operating Agreement

6. Select the desired pages and click on **OK**.

Choose Pages

Page Range

Pages: 1-20, / 20

Sample:1,5-9,12 ⓘ

Subset: All pages in range ▼

1 of 20 Pages

OK Cancel

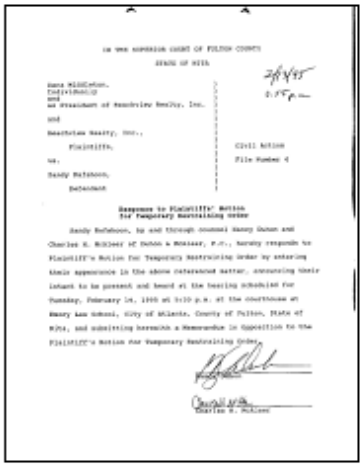


FIGURE 9-9

7. Then click **Combine**.

Version 10:

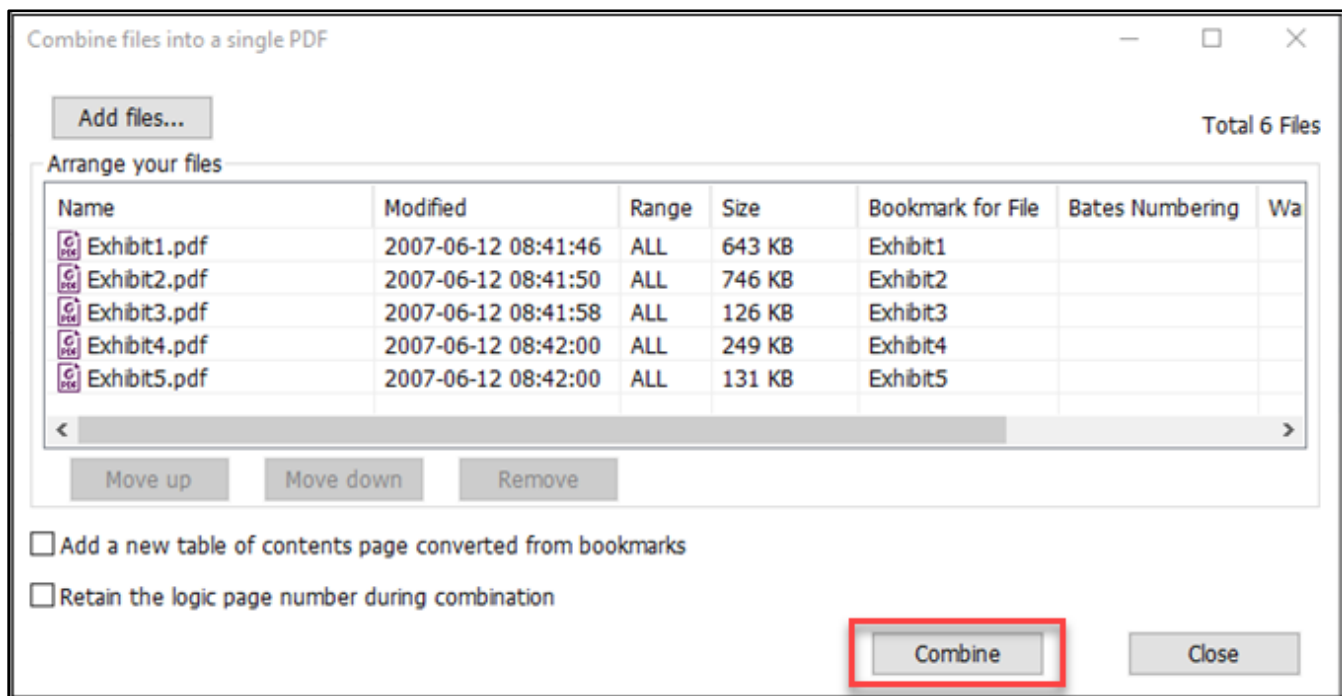


FIGURE 9-10

Version 11:

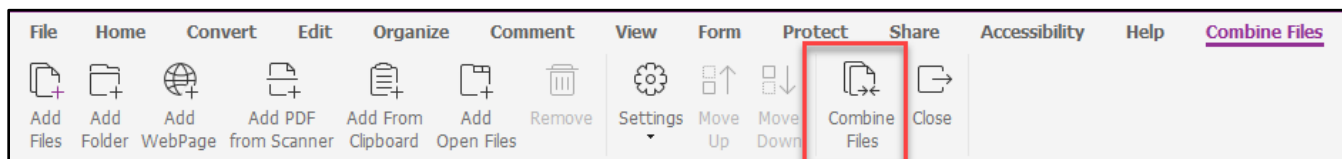


FIGURE 9-11

Version 12:



FIGURE 9-12

## File Menu

1. Under **File**, select **Create** ➔ **Combine Files** ➔ **Combine Files button**.
2. Follow the steps above to combine the files.

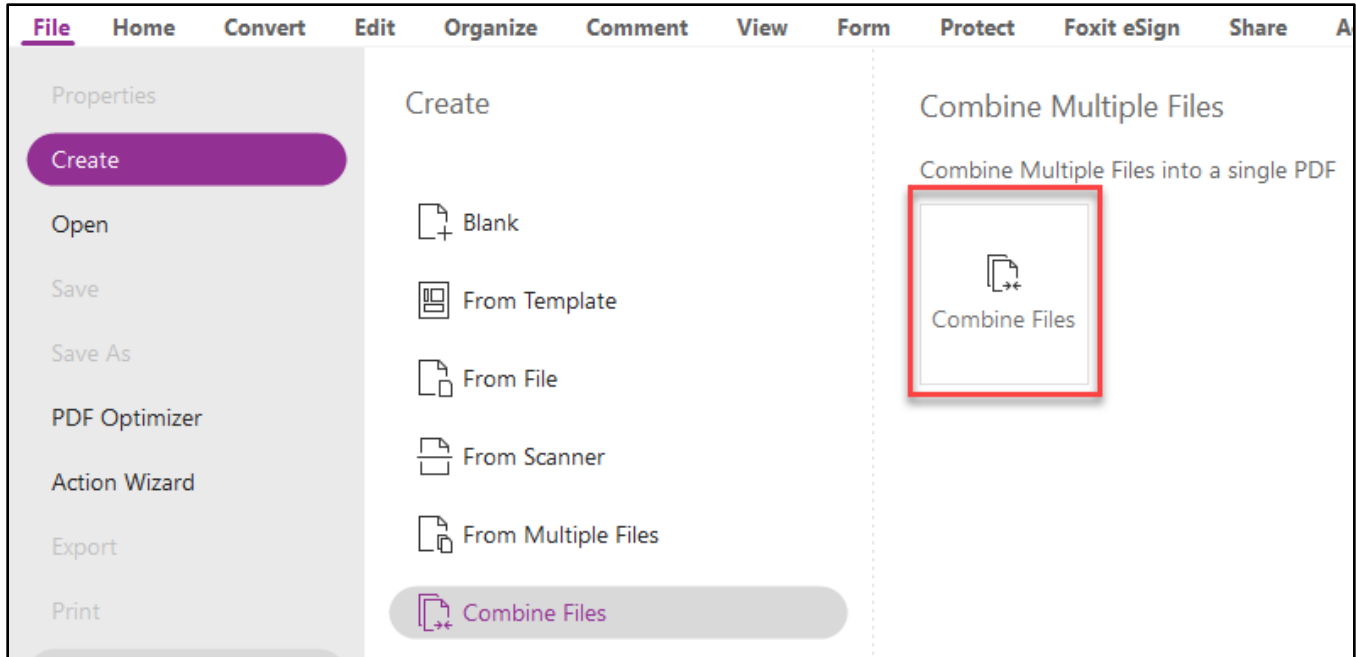


FIGURE 9-13

## File Explorer

This method works if all of the files to be combined are stored in the same folder.

1. Open the folder with the files in File Explorer.
2. Select the files to be combined (use Ctrl or Shift click to select multiple files).
3. Right-click and select **Combine files in Foxit PhantomPDF** (version 10) or **Combine file sin Foxit PDF Editor...** (versions 11 and 12).



FIGURE 9-14

4. Reorder the files using the **Up and Down buttons** if necessary.
5. Click on the **Combine button**.

# CHAPTER 10

## PDF PORTFOLIOS

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Portfolios let you collect a set of documents relating to a particular topic for convenient distribution. A portfolio is superior to a package because it can contain sub-folders and documents of differing file types (packages contain only PDF files in a single folder level). Portfolios can be managed by a modern Flash-based user interface. This interface lets you view the pages not only of PDF files in the portfolio, but additionally pages of Word, Excel, PowerPoint and a wide range of image files. These are displayed in a separate window.

### Create a PDF Portfolio

1. Select **File** ➔ **Create** ➔ **PDF Portfolio** ➔ **Portfolio**.

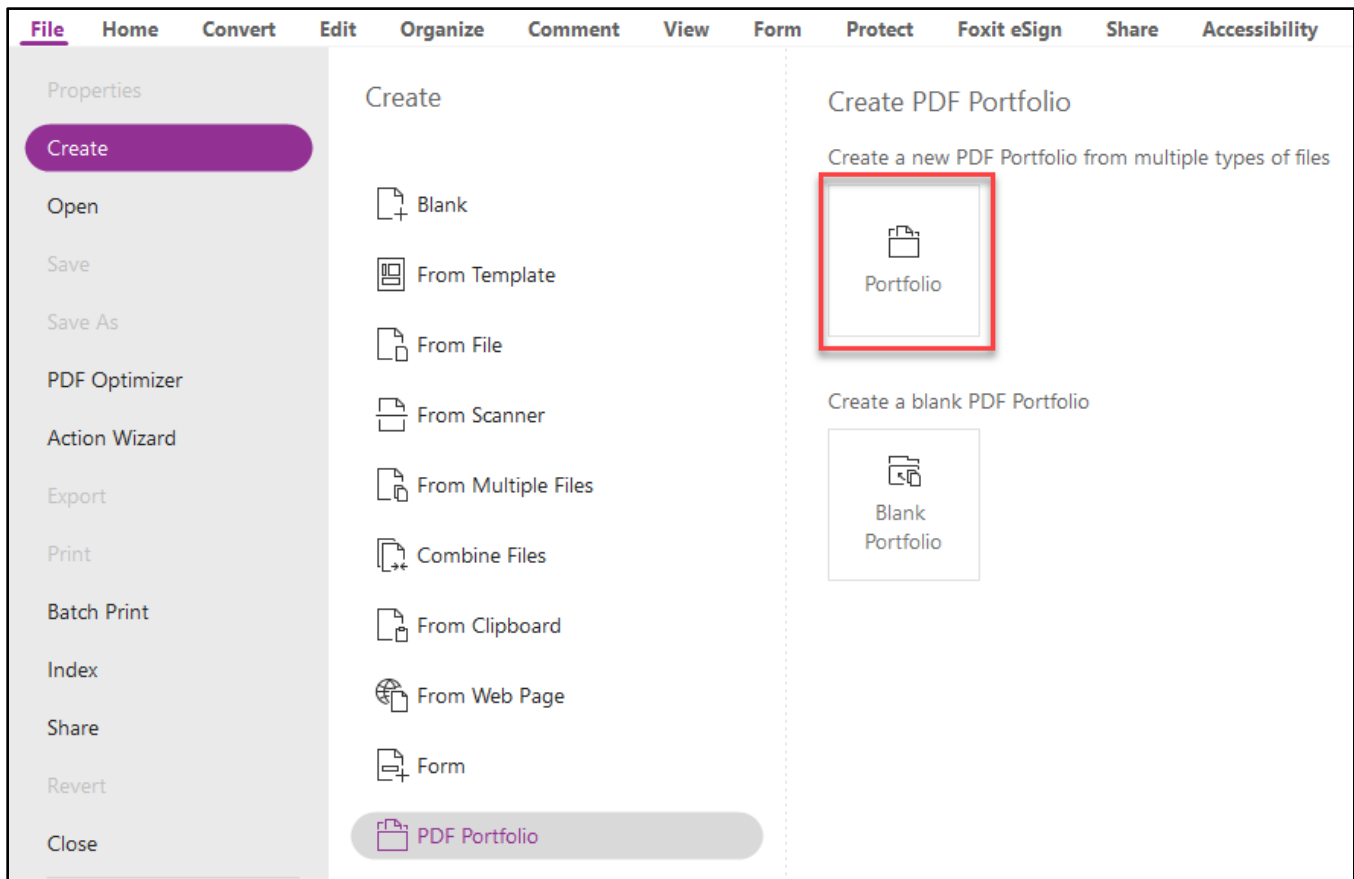


FIGURE 10-1

2. Select one or more existing files and click **Open**.
3. Click **Create**.

4. You can add additional files, add the whole contents of existing folders, or create new folders that you will fill by:
  - clicking the corresponding button, or
  - dragging and dropping files or existing folders onto PDF Portfolio Window.

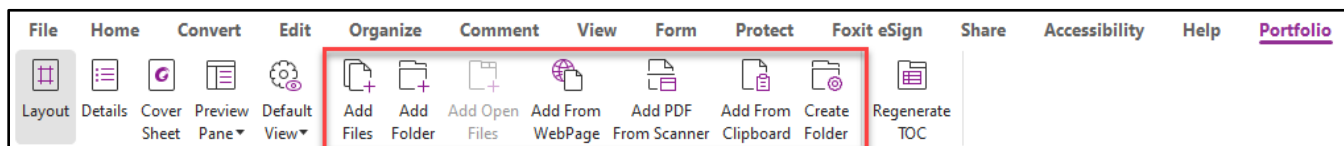


FIGURE 10-2

5. Documents added to the portfolio can be viewed either as thumbnail pictures or as a detailed list view. Switch from the **Thumbnail view** to **List view** and back using the **Layout** and **Details** buttons.

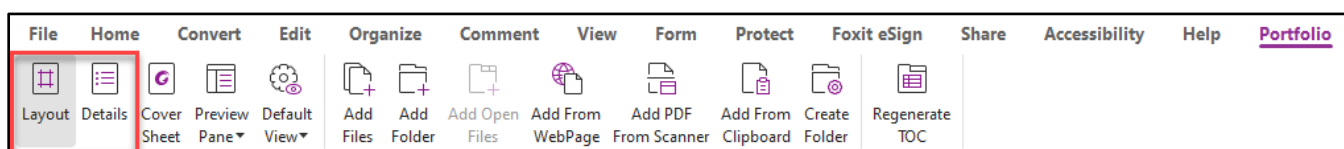


FIGURE 10-3

6. To reorder the files, drag and drop them in either view.

## CHAPTER 11

# REDUCING PDF FILE SIZE

---

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If you create PDFs that are too big to file with the court or to email (in terms of megabytes), it will make it difficult for people to download or work with them. If doing electronic court filing, breaking the PDFs into parts (part 1 of X, part 2 of X, etc.), makes the PDFs harder to navigate. Therefore, it's important that you understand how to create smaller PDFs initially and how to compress existing PDFs.

### Create Smaller PDF Files

PDFs created from a Word processor will be smaller than files created from a scanner. Whenever possible, create PDFs directly from the Word processor. If the PDF is still too large, there are settings within the Foxit PDF Editor ribbon and print driver that can help reduce the file size.

## Word Processor

When creating a PDF by printing to PDF, clicking on the **Printer Properties** link will provide an option to switch the default size, which can be reduced to **Smallest File Size** if needed.

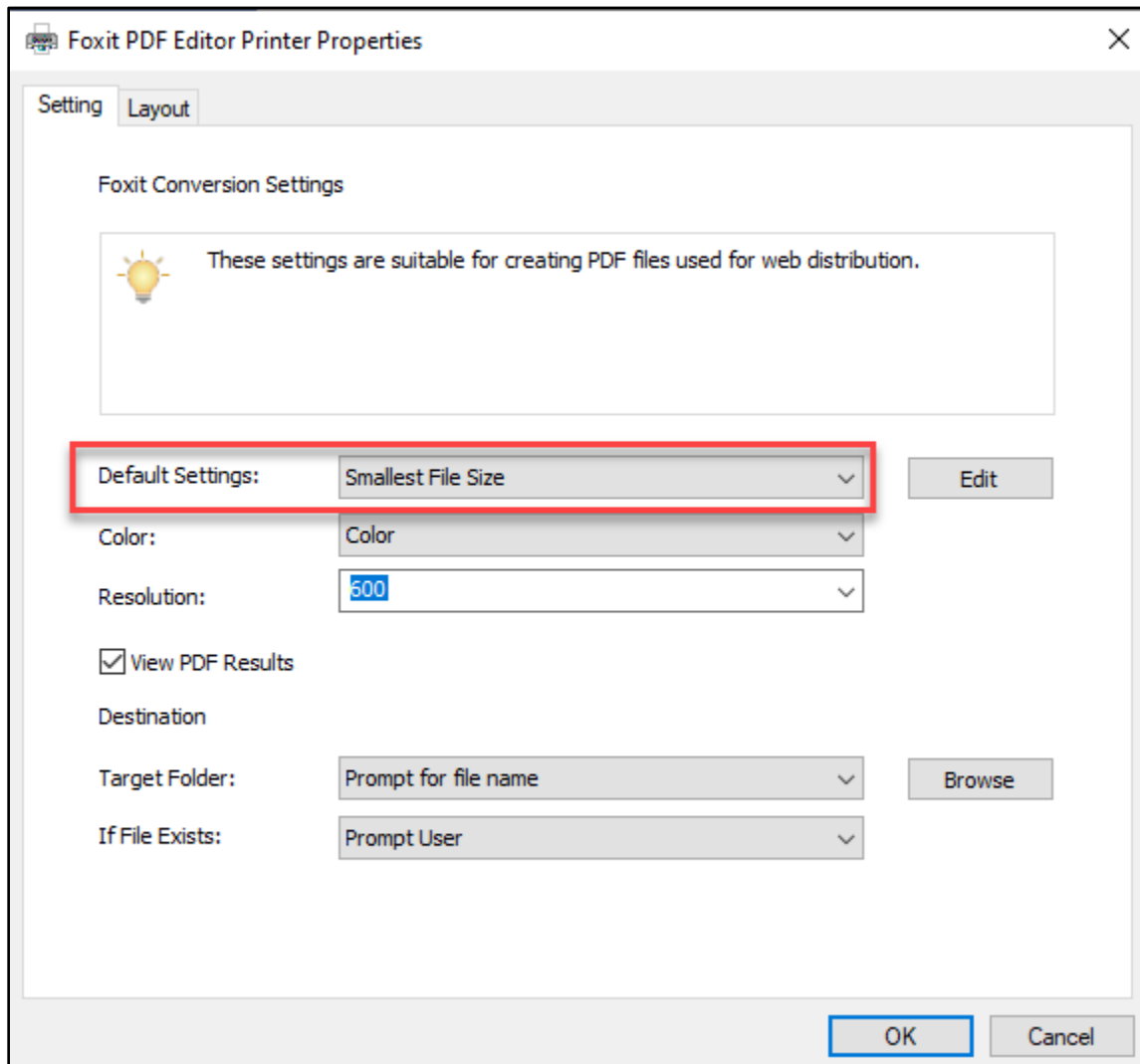


FIGURE 11-1

## Scanner

File size when you scan a document to a PDF is impacted by three things: 1) color mode, 2) dpi and 3) number of pages.

- **Color Mode:** Most scanners will allow you to scan in color, black and white or grayscale. Even if the document you're scanning has no color in it, the resulting scanned document will be very large if you scan with color mode set to color. The same thing is true with grayscale. To keep file size small, you want your scanner's color mode set to black and white.
- **DPI:** DPI stands for dots per inch and this is the resolution your scanner is set to. The higher the dpi, the better the quality. However, as you increase dpi, you also increase file size. Most

scanners can scan from 100 to 1,200 dpi. Generally, the best balance between quality and file size is 300 dpi.

- **Number of Pages:** The more pages you scan, the bigger the resulting file size. If you scan at 300 dpi black and white and the file is still too large, then there are still ways to reduce the file size as described below.

## Compress Existing PDF

1. Open the PDF to compress.
2. Under the **File** menu, click **PDF Optimizer**, then **Reduce File Size**, then **Current File**

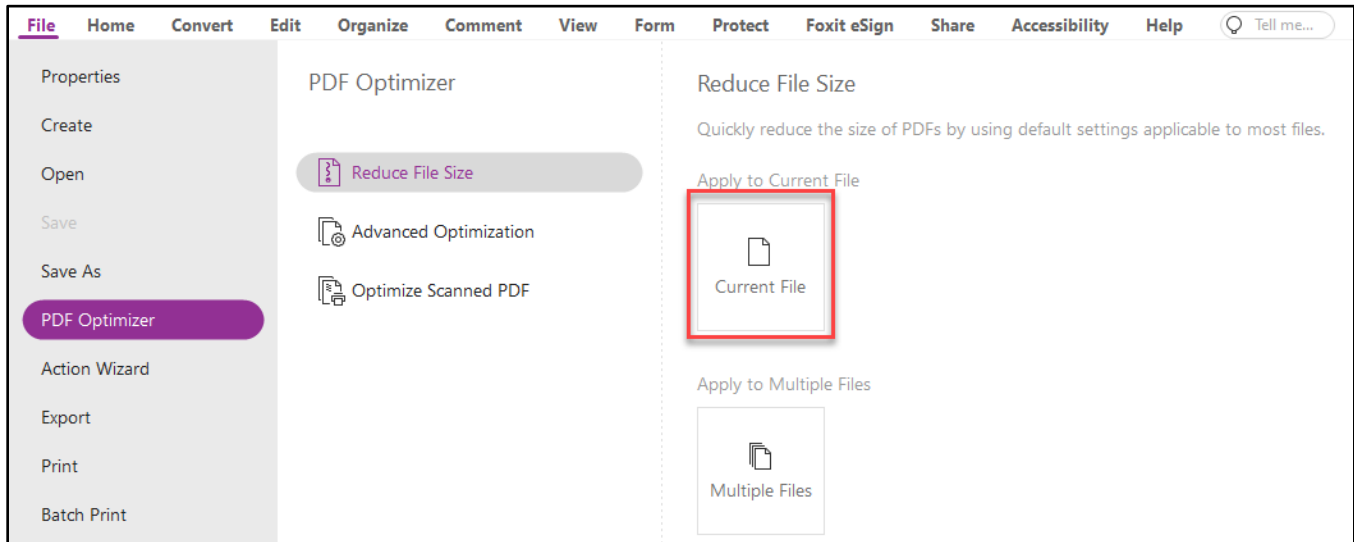


FIGURE 11-2

3. Save the reduced PDF with a new file name when prompted.

# CHAPTER 12

## SPLITTING A PDF

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If the PDF cannot be reduced to the necessary size, the PDF will need to be split into multiple smaller PDF files. PDFs may be split for other reasons, but file size is the most common reason.

### Determine the Size of Your PDF

Open the PDF in PDF Editor click the **File** ➔ **Properties** ➔ **Description tab** and you'll see a **Show More Information** link at the bottom. Click on the link to get the file size.

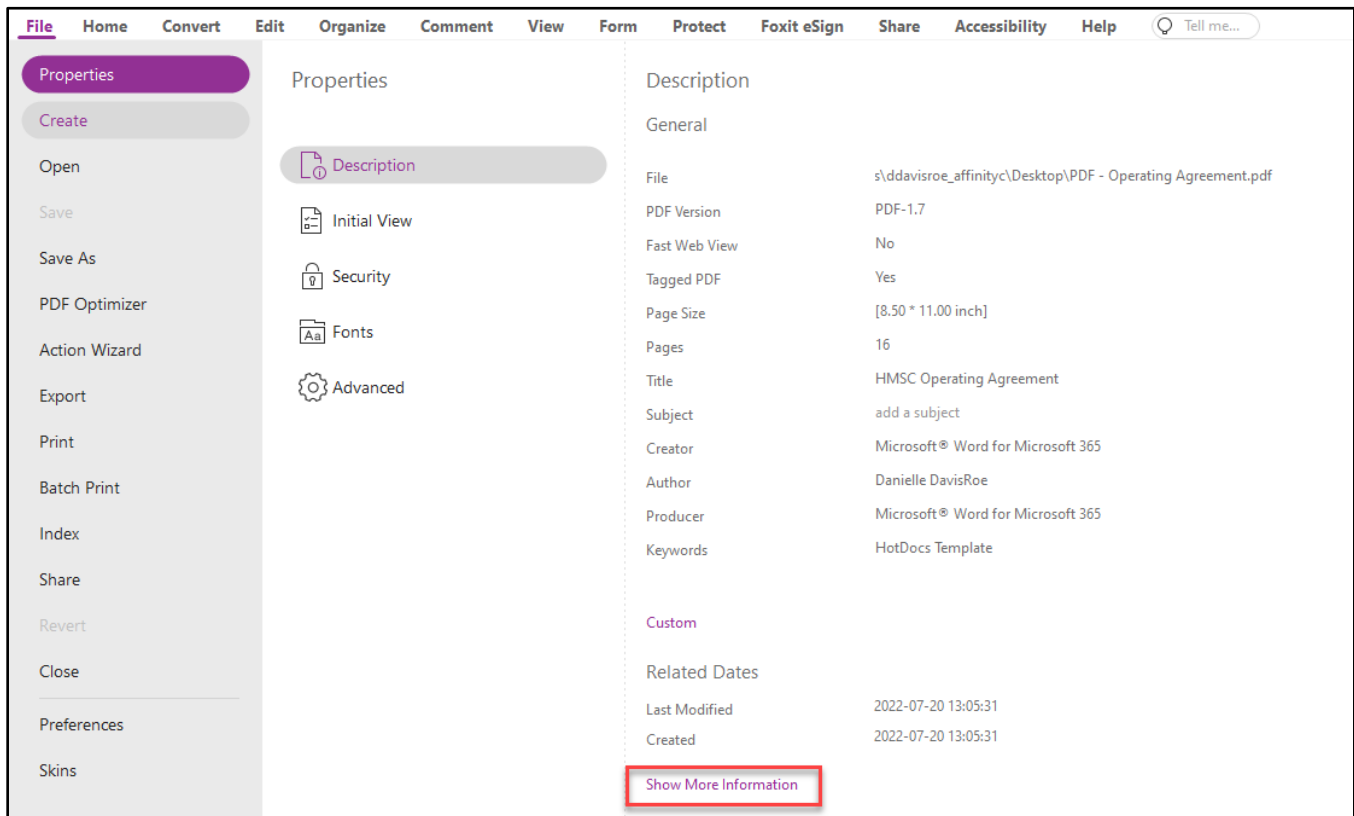


FIGURE 12-1

## Split a PDF

To split a PDF into two or more PDF files, open the desired PDF and select **Organize ribbon** → **Split**.

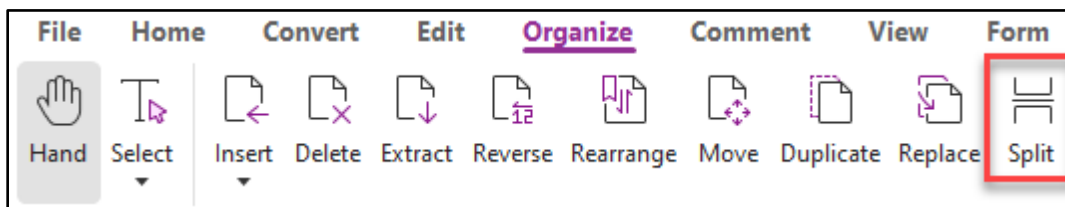


FIGURE 12-2

## Split Options

PDF files can be split by number of pages, file size, bookmarks, or blank pages.

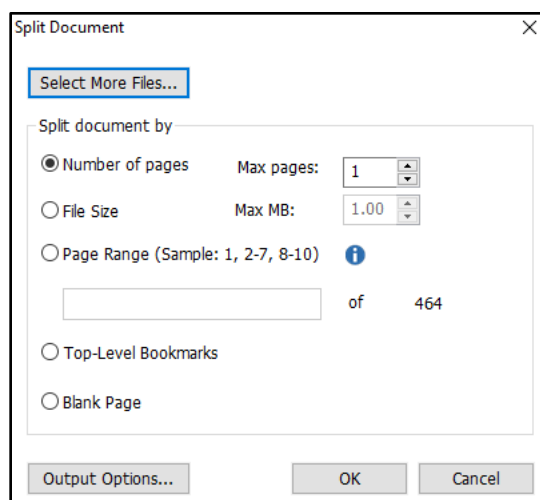


FIGURE 12-3

- **Number of pages.** This splits the PDF into separate files with a specific number of pages. The last file created may contain fewer pages.
- **File Size.** Use this option to split a PDF file into separate parts that do not exceed a specific file size. This is useful when emailing or e-filing PDFs with file size limitations.
- **Top-Level Bookmarks.** Splits the document at top level bookmarks.
- **Blank Page.** This splits the PDF whenever there is a blank page in the file.

To change where the results PDF files are saved or how they are named, click on **Output Options**.

# CHAPTER 13

## EDITING AND ANNOTATING PDFS

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### Typewriter Tool

Add text to any PDF (unless restrictions prevent it) at any location on the document using the typewriter tool.

1. Select **Home** ➔ **Typewriter**.

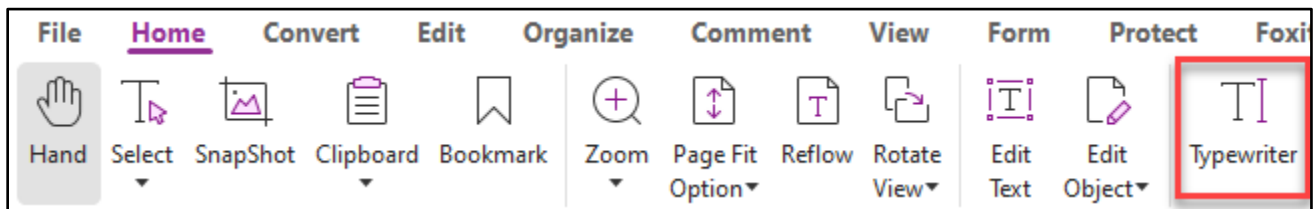


FIGURE 13-1

2. In version 10, change text properties (such as font) prior to typing from the **Comment Format ribbon**.

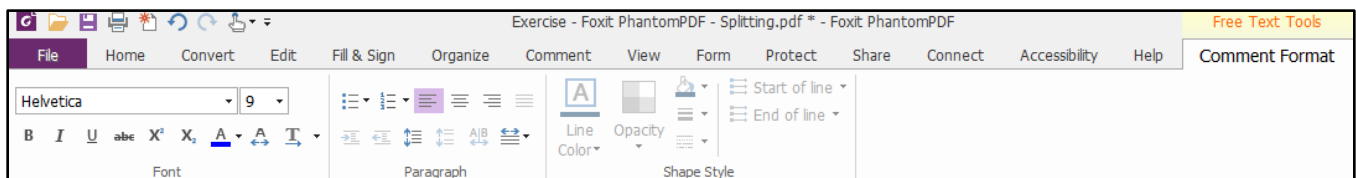


FIGURE 13-2

In versions 11 and 12, change the text properties (such as font) prior to type from the **Format** pane. If this pane does not open automatically, click on the arrow to expand it.

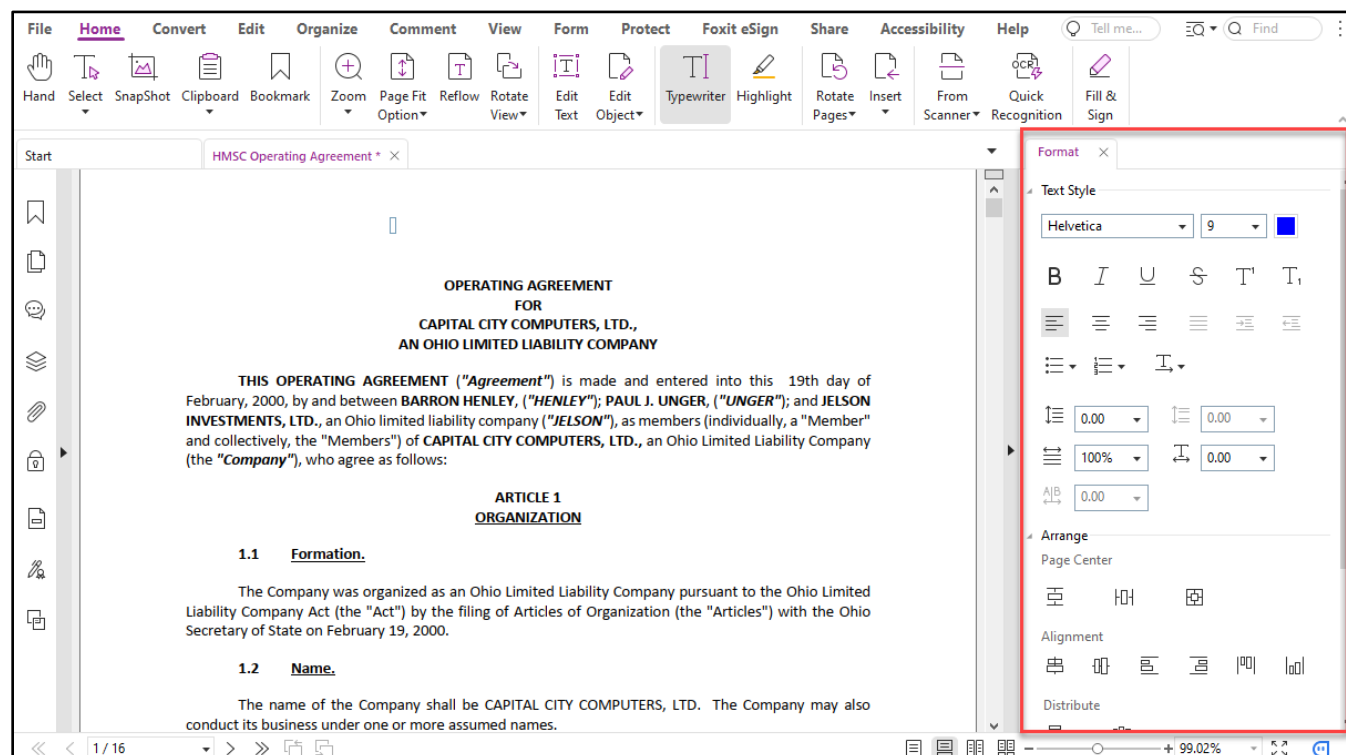


FIGURE 13-3

3. Click on the desired location to insert text and start typing.

## Comments

Comments are an excellent way to add annotations to documents when reviewing or marking them up. The basic comment toolbar in Adobe Acrobat Reader, which is probably what most users/clients would use to review a document, is easy to use and can display all the comments made via Foxit PDF Editor. The Comment ribbon contains the following groups and tools:

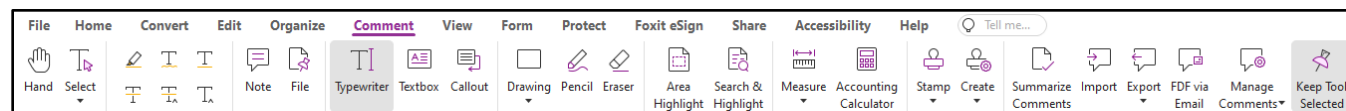


FIGURE 13-4

## Comment Types

- **Note (aka "Sticky Note"):** Place a note box on the page at a defined location and type in a note. Later the note box can be closed, leaving only a Note icon.

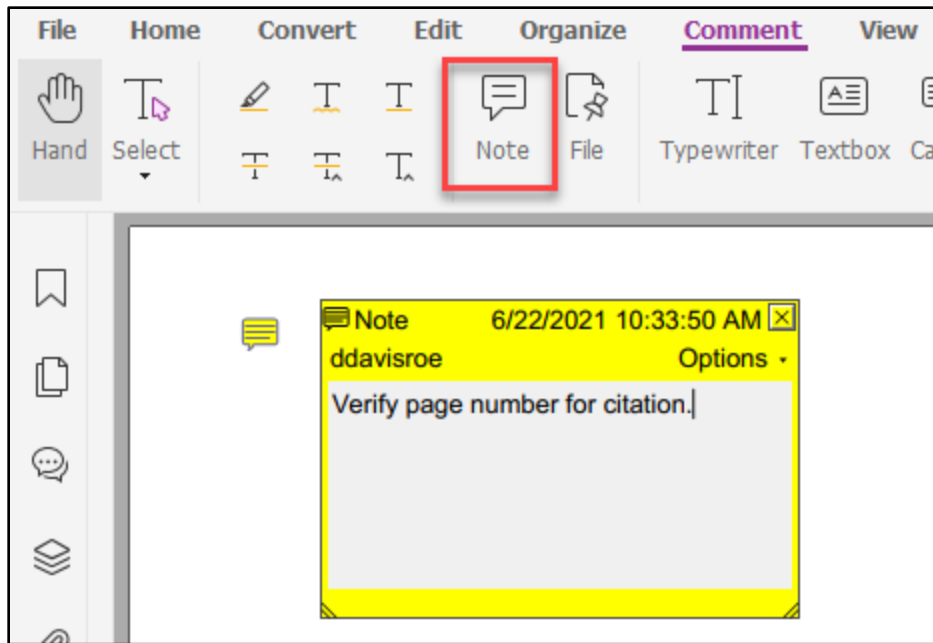


FIGURE 13-5

In versions 11 and 12, change the Note icon by clicking on it and selecting a different icon.

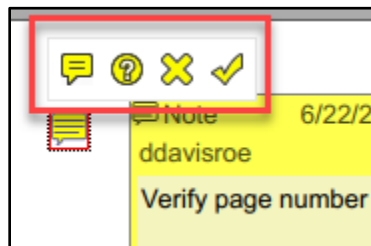


FIGURE 13-6

- **File:** Attach a file to the PDF at a specific place, marked by a pushpin. The attached file can then be opened by double clicking on the pushpin.

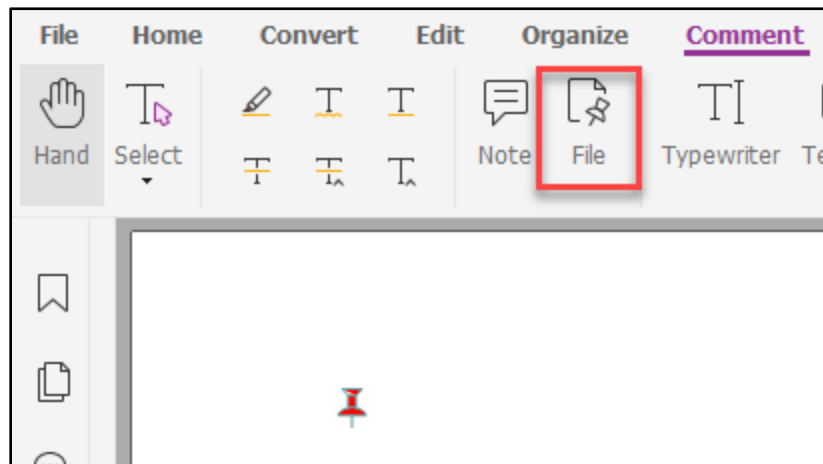


FIGURE 13-7

In versions 11 and 12, change the color of the push pin by clicking on it and selecting a new color.



FIGURE 13-8

- **Text Box and Callout:** Add a text box above other content on the PDF page. A callout works the same way but adds a line with an arrow.

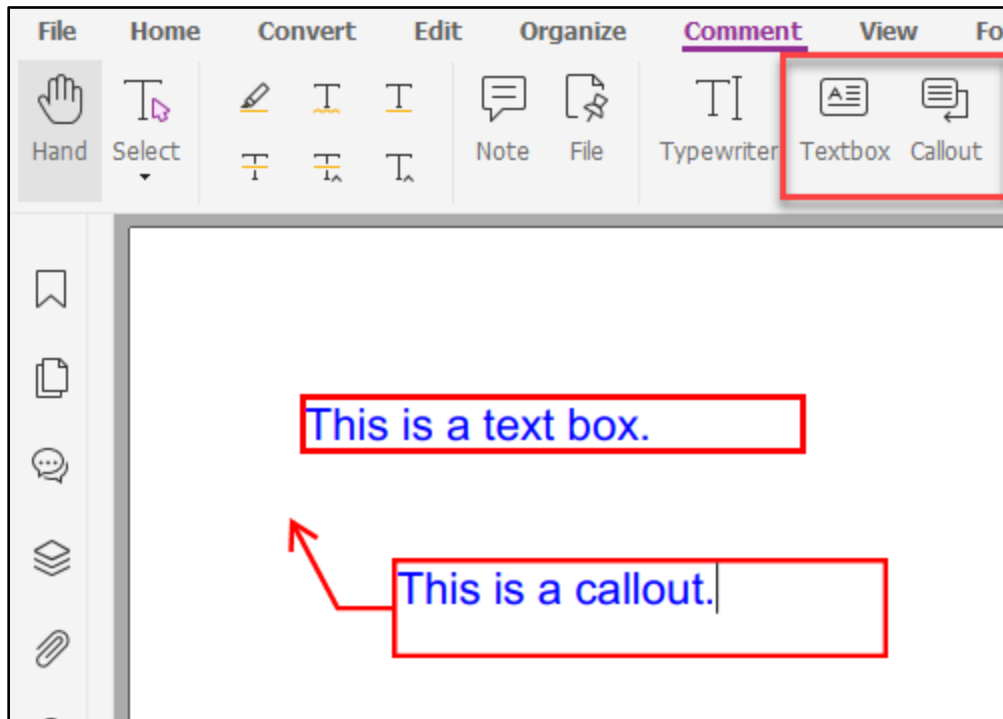


FIGURE 13-9

## Comment Summary

Create a summary of all comments in the current document by clicking on **Summarize Comments** on the **Comment ribbon**. Choose to print or save just the summary, or print it together with the document pages with a choice of layouts to the comments with their location

in the document. Below are some recommended choices, but it will really depend on how you want the comments summarized (on one sheet, multiple sheets, etc.)

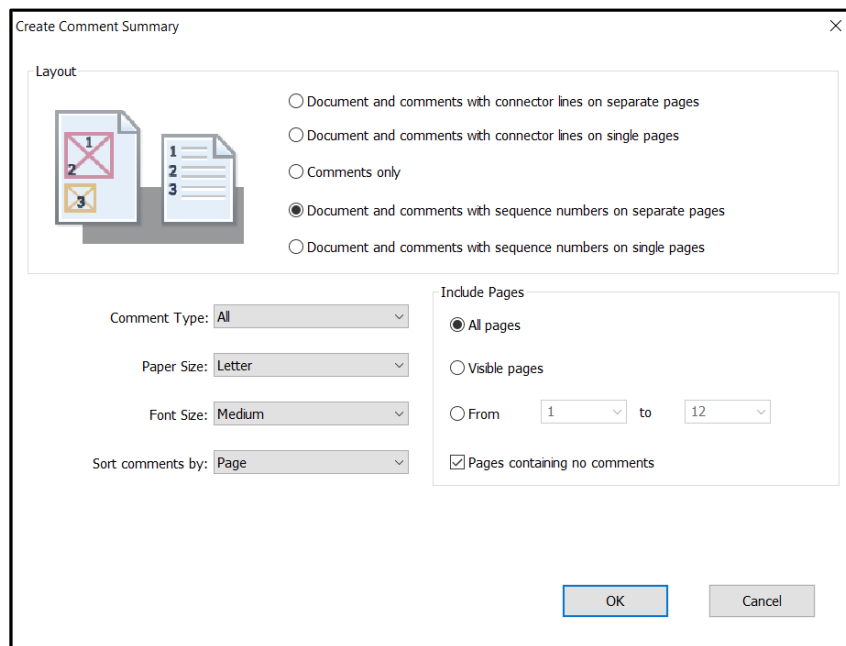


FIGURE 13-10

## Formatting Comments

In version 10, when using a commenting tool, a contextual ribbon for that tool will appear. Edit the appearance of the comments from the contextual ribbon.

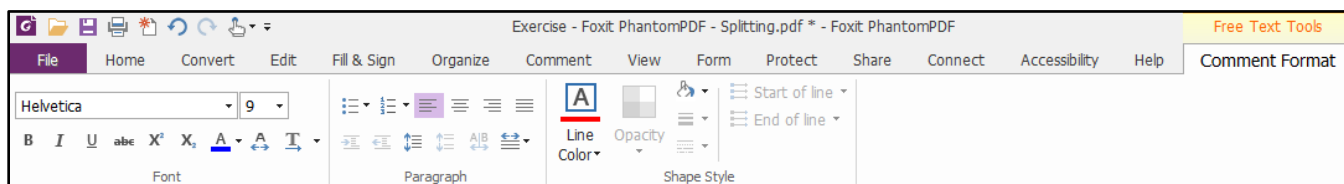


FIGURE 13-11

In version 11 or 12, when using a commenting tool, a Format pane for that tool will appear. Edit the appearance of the comments from the contextual ribbon.

## Other Mark Up Tools

- **Text Markup Tools:** Apply these markup styles to selected text to highlight, underline, or cross out the text.

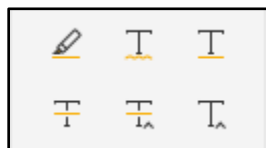


FIGURE 13-12

- **Drawing Tools:** Choose a drawing tool from the drop-down list and use it to draw the desired object. Right-click with the **Hand** tool on an object to modify its properties.

## Convert to Word, Excel, or PowerPoint

To convert a PDF into a Word, Excel, or PowerPoint document, click on appropriate button on the **Convert ribbon**.

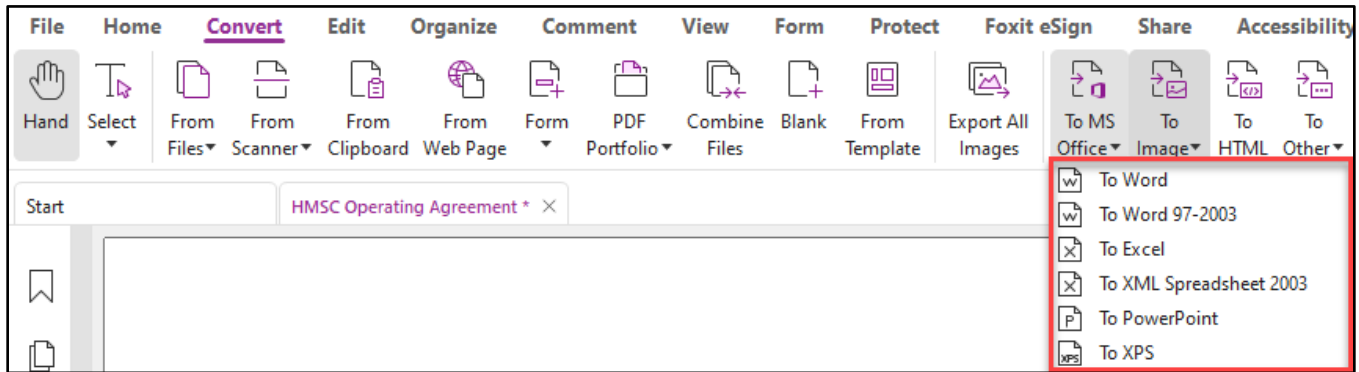


FIGURE 13-13

The resulting document will need the formatting cleaned up. Be sure to double check that you are not missing any content after the conversion.

# CHAPTER 14

## ELECTRONIC "IMAGE" STAMP SIGNATURE

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### Create The Stamp

Instead of printing a PDF, signing it, and then re-scanning the image, consider adding a signature image stamp to the PDF. Here are the steps:

1. Sign a piece of blank paper.
2. Scan the signature - crop the large unwanted areas and save as a JPEG or other compressed common graphic file format (PNG, etc.). Note the location where it is saved.
3. On the **Comment ribbon**, click on the **Create button**, and select **Create Custom Stamp**.

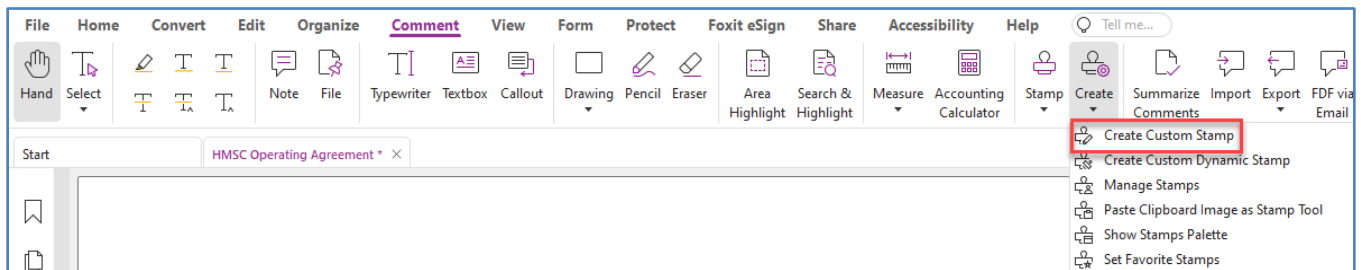


FIGURE 14-1

4. Browse to the saved location, create a group and name (if desired) to organize your signatures.

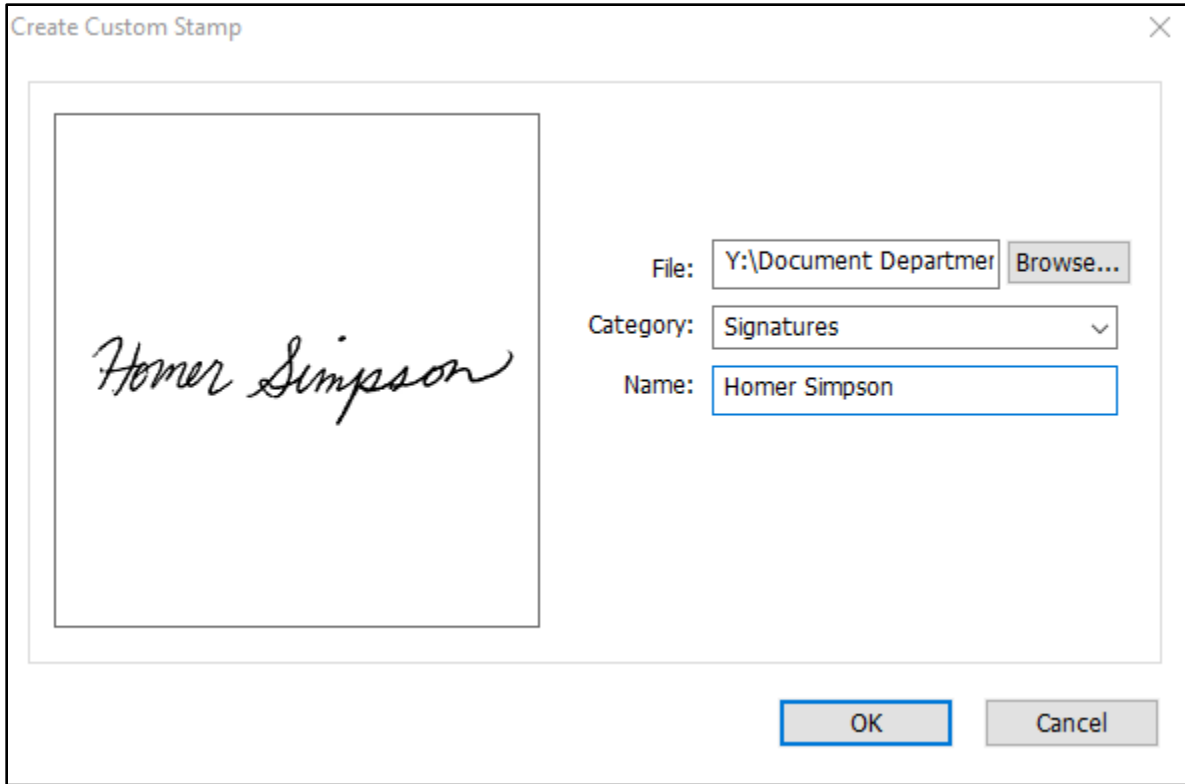


FIGURE 14-2

5. To insert the signature into the PDF, select the stamp tool from the gallery and the desired stamp. Move your mouse (signature) where you want it to appear and click.

# CHAPTER 15



# BOOKMARKS AND LINKS

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You can create bookmarks and links in your PDFs so recipients/reviewers of the PDF can more easily navigate the PDF.

## Creating Bookmarks

1. In **Navigation Pane**, you'll see an icon for bookmarks. Just click on it to reveal the bookmarks in your document (if any). In version, the **bookmarks button** looks like this:

 . In versions 11 and 12, it looks like this: .

2. Select the text in the document for which you would like to create the bookmark.
3. Right-click it, then click on the **Add Bookmark button**.

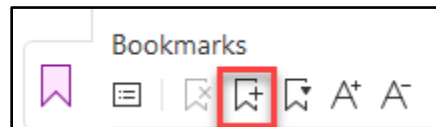


FIGURE 15-1

4. Adjust the name of the bookmark. You can now navigate back to that spot by click the bookmark name in the Bookmark panel on the left side of the document.

## Bookmark Customizations

### Change the Order of Bookmarks

If your bookmarks aren't in the order you want in the bookmark pane, simply click on one and, holding down on your left mouse button, drag it into the correct position.

### Change the Format of the Bookmark Link

By right-clicking on a bookmark in the Bookmarks pane, and clicking on **Properties**, you can also make a bookmark bold, italic, or bold & italic. By default, they're "plain."

## Making Bookmarks Visible Immediately Upon Opening a PDF

If you want the bookmarks to be visible when the judge or someone else opens your brief, click on **File** ➔ **Properties** ➔ **Initial View**. Under the top dropdown, select "Bookmarks Panel and Page."

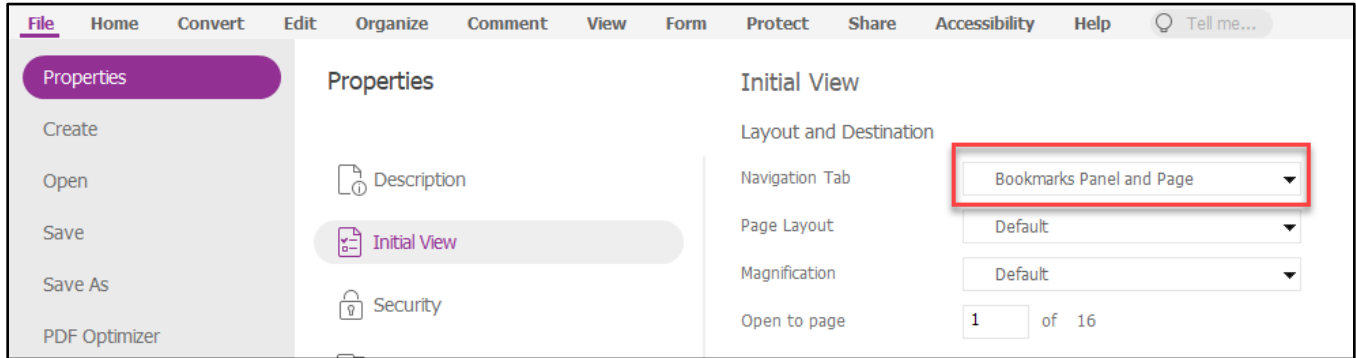


FIGURE 15-2

Also note that you can control the initial page layout, magnification and what page a PDF opens to.

## Creating Tables of contents

You can create a table of contents based on the bookmarks in a PDF.

1. Open the **Bookmarks panel**.
2. In the **Bookmarks panel**, click on the **Options button** , and select **New TOC from bookmarks**.

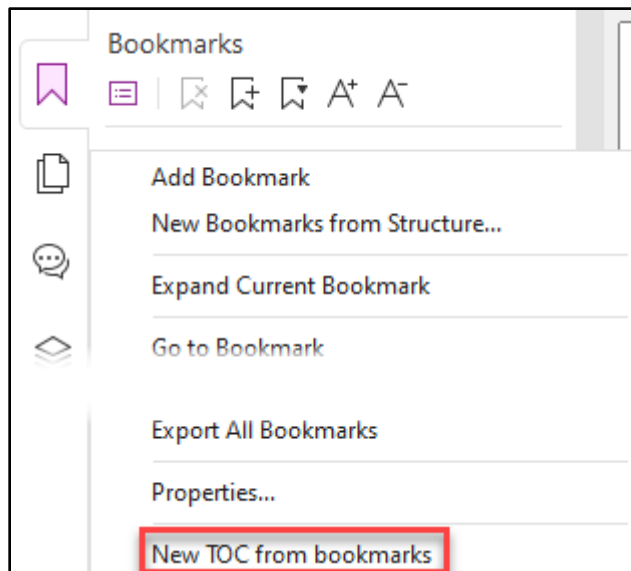


FIGURE 15-3

3. Choose the number of levels to display and click **OK**.

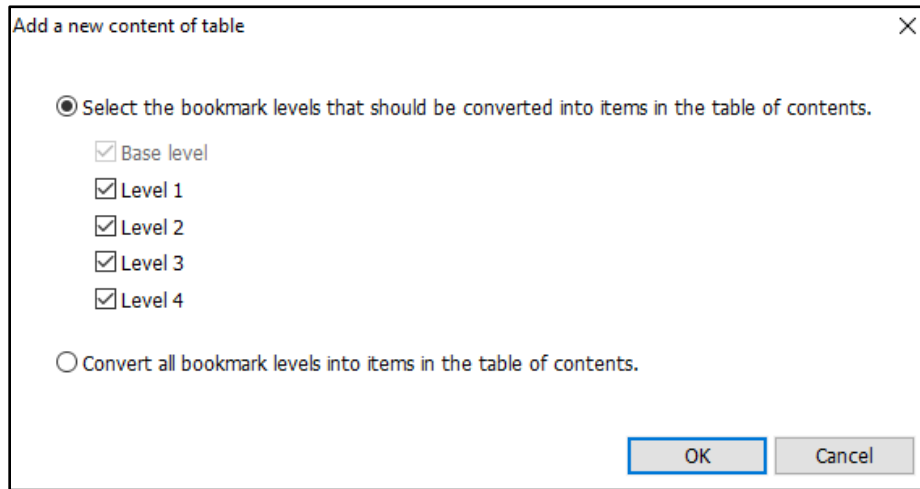


FIGURE 15-4

# CHAPTER 16

## WATERMARKS

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PDF Editor's watermark feature is a graphic or word(s) displayed as a faint background (usually light gray), so it can easily be seen by readers, but it isn't so dark that one cannot read the text. Most often it is used to clearly identify to the reader that the document is a draft.

### Create a New Watermark

1. On the **Organize ribbon**, click on the **Watermark button**, and select **Add**.

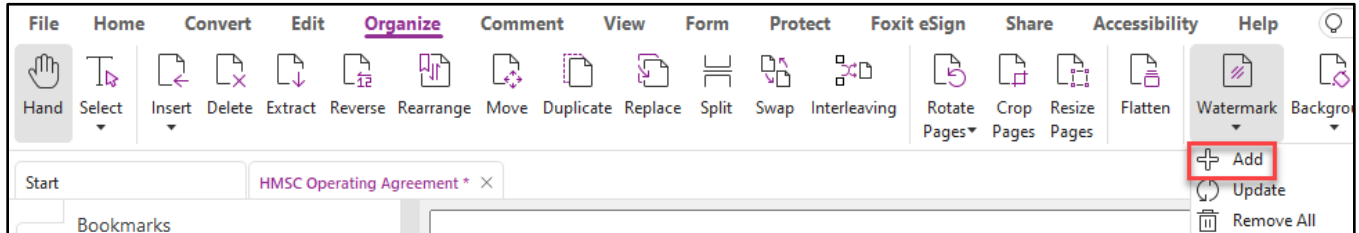


FIGURE 16-1

- Add Watermark

Saved Settings: [None specified] Delete Save Settings...

Source

Text:

DRAFT

Font: Helvetica Size: [ ] [ ] [ ] [ ]

Page Number: 1 Absolute Scale: 100%

File: [ ] Browse...

Appearance

Rotation: [ ] -45° [ ] None [x] 45° [ ] Custom 45°

Opacity: [ ] 50%

☒ Scale relative to target page 50%

Location: [x] Appear behind page [ ] Appear on top of page

Page Range Options...

Position

Vertical Distance: [ ] 0.00 [ ] Inches [ ] from [ ] Center

Horizontal Distance: [ ] 0.00 [ ] Inches [ ] from [ ] Center

Page Range Options...

Preview

Preview Page: 1

OPERATING AGREEMENT  
FOR  
CAPITAL CITY COMPUTERS, LTD.,  
AN OHIO LIMITED LIABILITY COMPANY

THIS OPERATING AGREEMENT ("Agreement") is made and entered into this 19th day of February, 2000, by and between **BARON HENLEY**, ("HENLEY"); **PAUL J. UNGER**, ("UNGER"); and **JELSON INVESTMENTS, LTD.**, an Ohio Limited Liability Company ("JELSON"), as members (individually, a "Member" and collectively, the "Members") of **CAPITAL CITY COMPUTERS, LTD.**, an Ohio Limited Liability Company (the "Company"), who agree as follows:

ARTICLE 1  
ORGANIZATION

1.1 Formation.

The Company was organized as an Ohio Limited Liability Company pursuant to the Ohio Limited Liability Company Act (the "Act") by the Board of Directors of Organization (the "Directors") with the Ohio Secretary of State on February 15, 2000.

1.2 Name.

The name of the Company shall be **CAPITAL CITY COMPUTERS, LTD.** The Company may also conduct its business under one or more assumed names.

1.3 Purposes.

The purposes for which the Company is formed are to engage in any activity within the purposes for which a limited liability company may be formed under the Act.

1.4 Duration.

The Company shall continue in existence for a perpetual term, or until the Company shall be sooner dissolved and its affairs wound up in accordance with the Act or this Agreement.

1.5 Offices and Resident Agent.

The principal office of the Company shall be at: 123 Maple Street, Columbus, Ohio 43215, or such other office within or without the State of Ohio as the Members may from time to time determine. The Registered Office and Resident Agent of the Company shall be as designated in the Articles or any amendment thereof.

1.6 Definitions.

The terms set forth on Exhibit A shall have the meanings as set forth thereon when used in this Agreement.

Show Preview

OK

Cancel

FIGURE 16-2

# CHAPTER 17

## FLATTENING PDFS

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If you use the Typewriter tool, electronic signatures or any of the annotation tools described previously and send that PDF to someone who owns advanced PDF editing software, they'll be able to select your annotations, move or delete them. Flattening a PDF means to move these annotations into the main layer of the PDF so that they will always print and cannot be easily selected, deleted, or moved.

There are two ways to flatten PDFs:

### Print to PDF

Open the PDF, click **File menu** ➔ **Print** ➔ choose the **Foxit PhantomPDF printer** (version 10) or **Foxit PDF Editor Printer** (versions 11 and 12). This creates multiple copies of the same PDF.

### Flatten File Button

On the **Organize ribbon**, select **Flatten**. Select the desired pages and then **OK**. Then **Save** your PDF again.

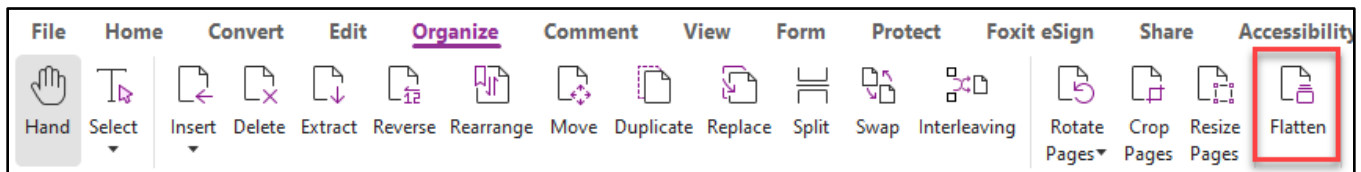


FIGURE 17-1

# CHAPTER 18

# REDACTION

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## Importance of Proper Redaction

The importance of properly redacting a document cannot be understated. **Using the Redaction tools, as described in this chapter, is the only proper way to redact information.** Any other method may result in the disclosure of redacted information. One merely needs to read the news to see prominent attorneys in trouble for improperly redacting documents.

## Save a Copy First

Start by creating a copy of your PDF. **Redactions cannot be undone unless the PDF is closed without saving changes.**

## Text-Searchable PDF: Search and Redact

To search for text and redact, select **Protect ribbon** → **Mark for Redaction** → **Search and Redact**.

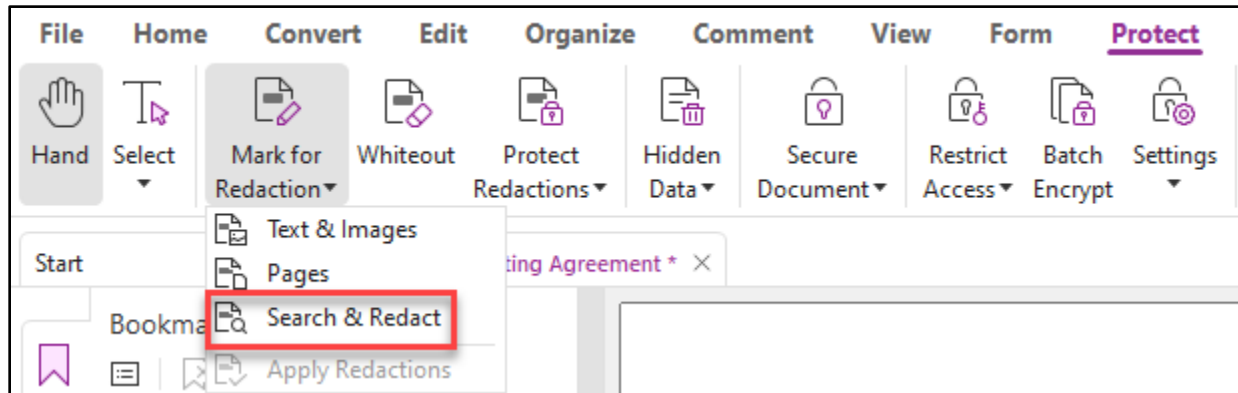
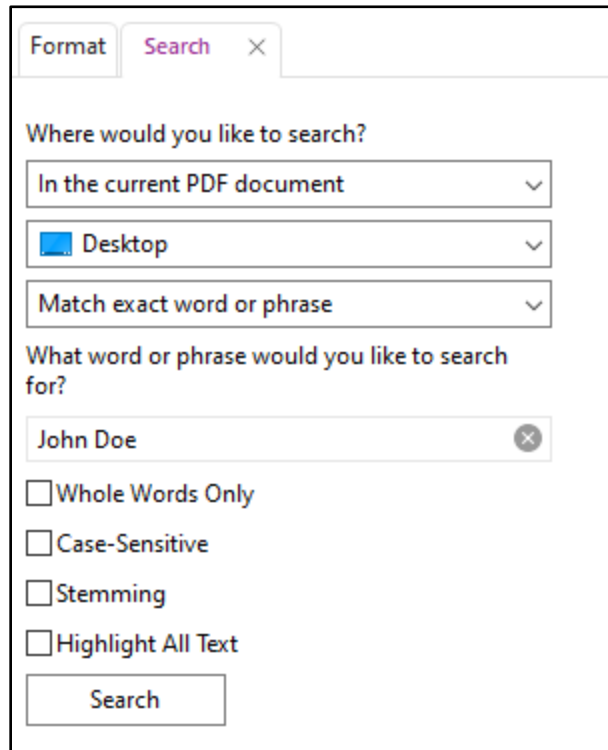


FIGURE 18-1

Set your search terms in the **Search** pane.



Format Search ×

Where would you like to search?

In the current PDF document ▾

Desktop ▾

Match exact word or phrase ▾

What word or phrase would you like to search for?

John Doe ×

☐ Whole Words Only

☐ Case-Sensitive

☐ Stemming

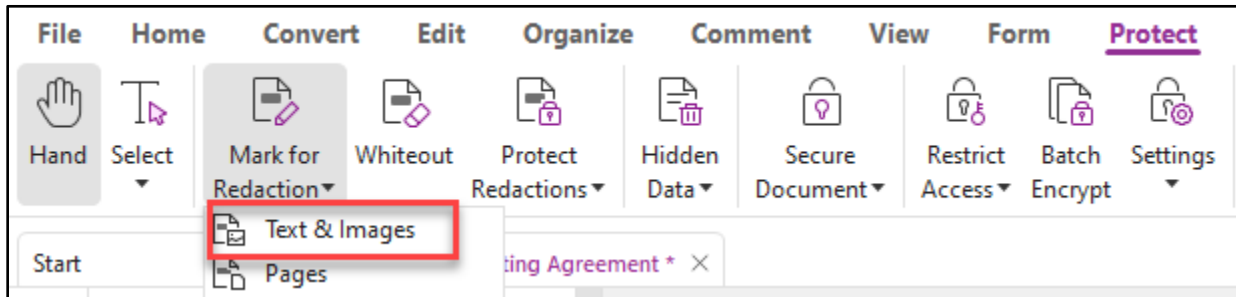
☐ Highlight All Text

Search

FIGURE 18-2

## Redact Area

1. Mark your redactions next. Select **Protect ribbon** → **Mark for Redaction** → **Text & Images**.



2. To redact a region or area, using your mouse, simply click and drag over an area, as represented in the larger red rectangle below.

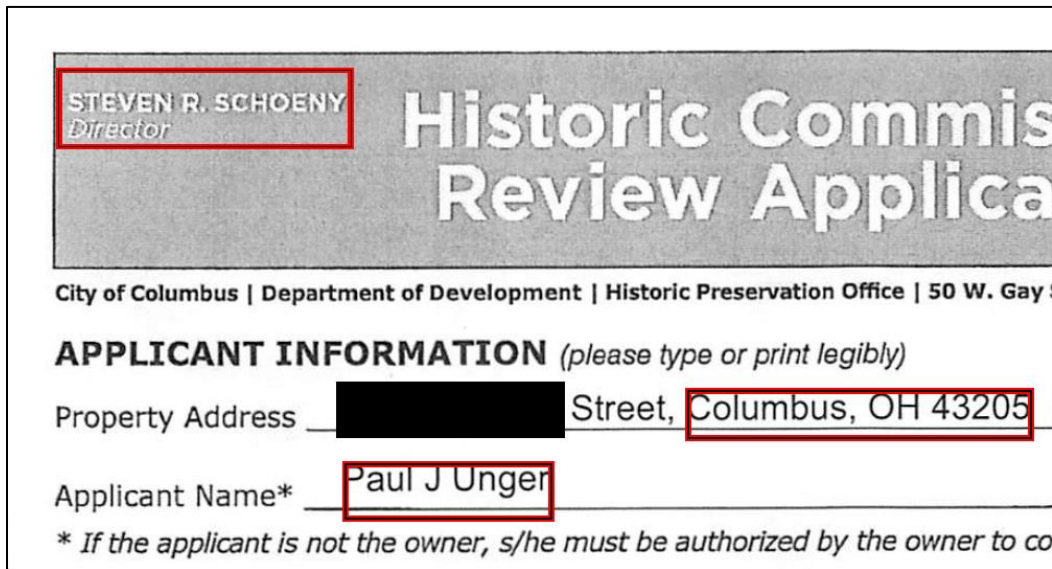


FIGURE 18-3

## Redaction Properties

To change the redaction properties, right click in the redacted area and click on **Properties**. You can change the redacted area fill color or add overlay text.

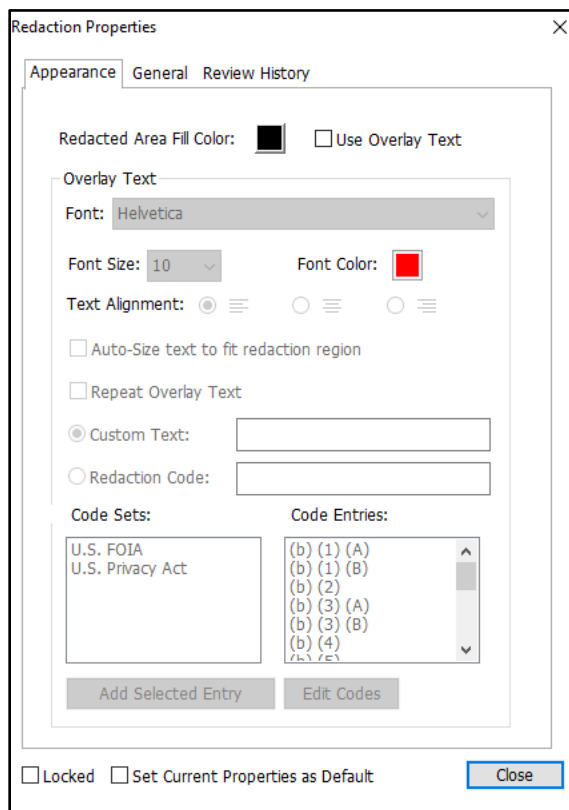


FIGURE 18-4

## Apply Redactions

To apply the redactions, **Protect ribbon** ➔ **Mark for Redaction** ➔ **Apply Redactions**. The redactions cannot be undone unless you exit the document without saving your changes.

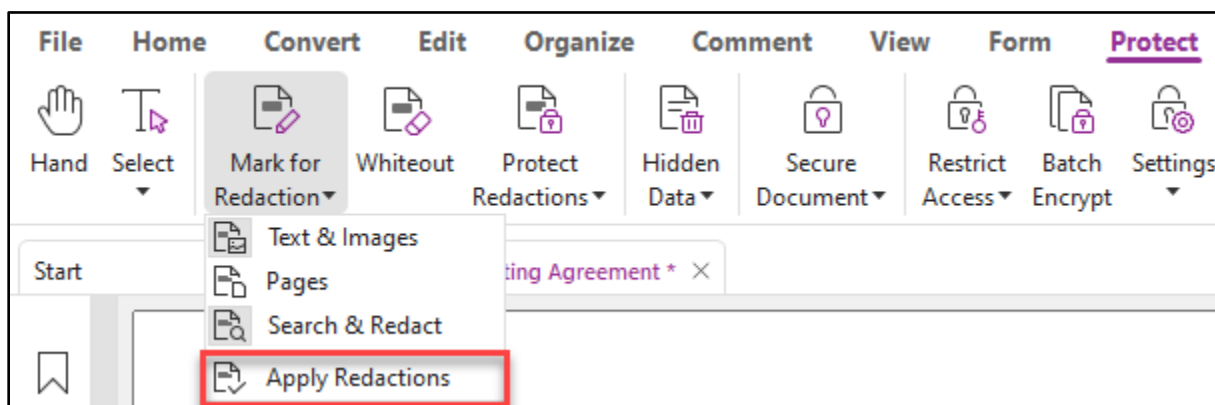


FIGURE 18-5

## AI Powered Redaction

Foxit Smart Redact, an optional add-in for PDF Editor, makes it faster to redact documents using the power of AI. You can learn more at <https://www.foxit.com/smart-redact/>.

## CHAPTER 19

# SECURITY FOR PDF FILES

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When creating PDF documents from within PDF Editor, authors can use password security to add restrictions that can prevent a document from being opened, printed or edited.

### Password Security

1. To apply security to a PDF, under the **File menu**, select **Properties**, then **Security**.
2. Change Security Method from No Protection to **Password Protection**.

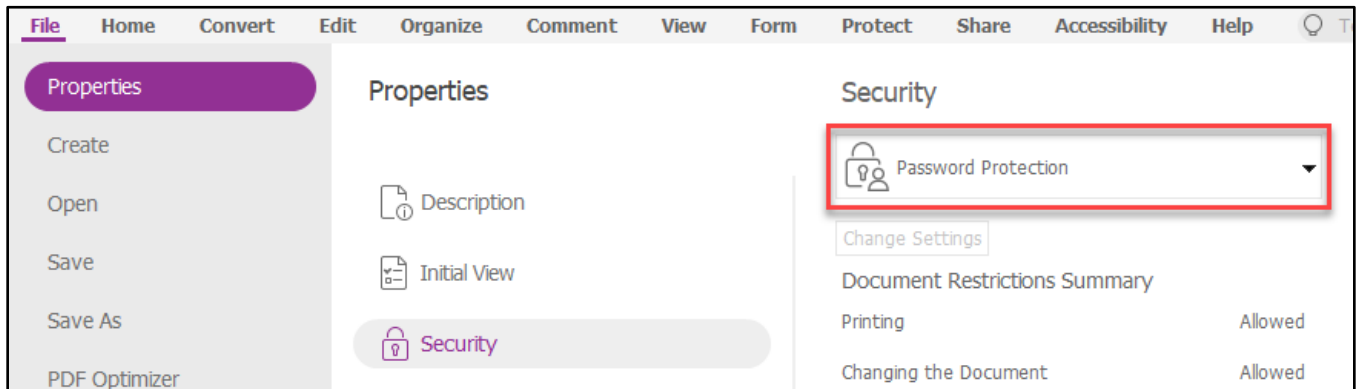


FIGURE 19-1

3. You can add password protection to open the document and passwords to print or change the document in this screen. Also note that you can prevent copying of text, images or other content by clicking on the **Permission button**.

✕

Password Protection

Document Open Settings

☐ Require a password to open the document

Password Input:

Password Confirm:

Document Restriction Settings

☐ Add Document Restriction

Password Input:

Password Confirm:

Permission Specification

Printing: High Resolution

Accessibility: Allowed

Copying: Allowed

Changes: Any except extracting pages

Permission...

Encrypt Settings

Encryption Algorithm: ☒ 128-bit AES ☐ 256-bit AES ☐ 128-bit ARC-FOUR

☐ Don't encrypt metadata

☐ Save the settings as a new policy

OK

Cancel

FIGURE 19-2

# CHAPTER 20

## ELIMINATING PDF HIDDEN CONTENT

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People often mistakenly assume that PDFs have no metadata. This is not true. In fact, PDF Editor has a feature which allows you to easily find and remove hidden information from a document that you don't want, such as hidden text, metadata, comments, and attachments.

To remove metadata, in version 10 click on the **Protect ribbon** ➔ **Sanitize Document**.

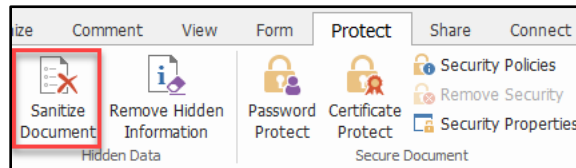


FIGURE 20-1

In versions 11 and 12, click on **Protect ribbon** ➔ **Hidden Data** ➔ **Sanitize Document**.

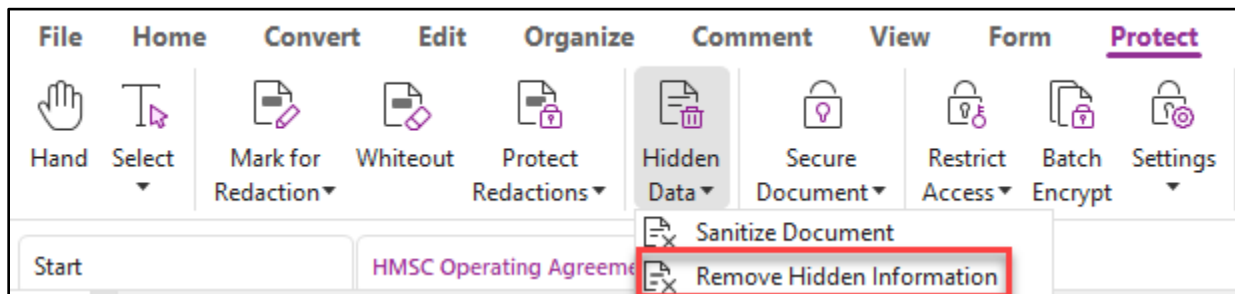


FIGURE 20-2

## CHAPTER 21

# FILLABLE FORMS

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### Draft the Background Form

First, create the background form by either (1) creating it in a program like Microsoft Word or Publisher and saving it as a PDF, or (2) scanning it and saving it as a PDF.

You will get a much cleaner and crisper quality document if it is re-created electronically in Word or Publisher and then printed or saved as a PDF.

Once you have the underlying document converted to PDF, you will be ready to add the form fields in PDF Editor.

### Detect Form Fields

To convert an existing PDF to a fillable form, on the **Form ribbon**, click on the **Run Form Field Recognition** button.

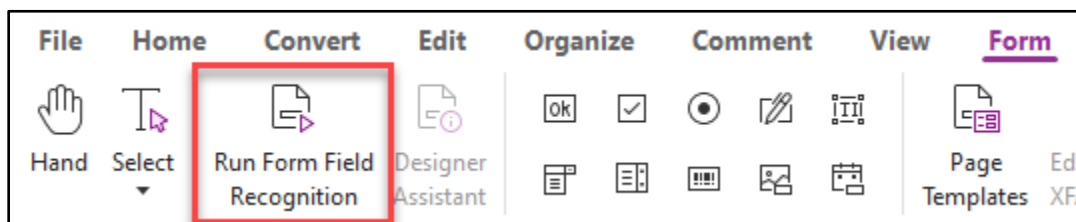


FIGURE 21-1

PDF Editor will automatically detect fields in the PDF and add form elements to those spaces. Some manual cleanup will typically be required.

## Clean Up the Form

Once the fields have been added, the easiest way to manage them is from the **Manage Form Fields panel**.

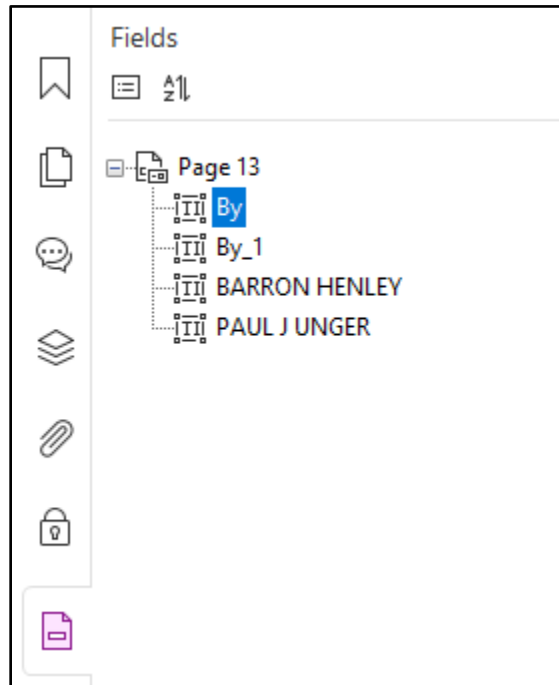


FIGURE 21-2

## Fix Tab Order

The Tab Order is the sequence in which your cursor moves from field to field when you hit the tab key on your keyboard.

1. Open the **Manage Form Fields panel**. See Figure 21-2 above.

2. Click on the **Set order button** or right-click on any field and click on **Show Tab Numbers**.

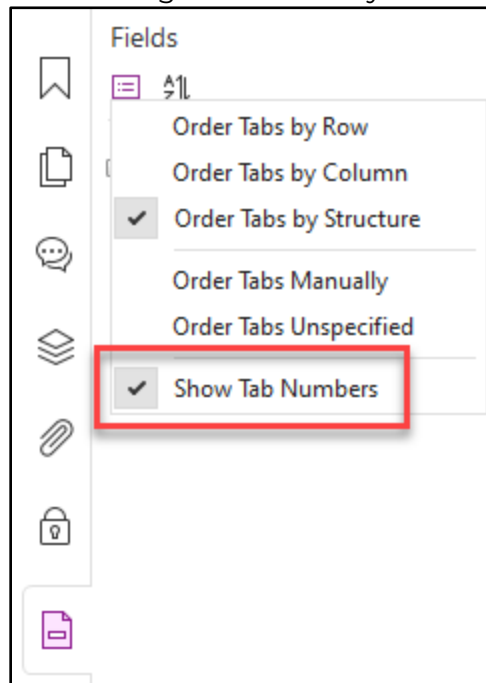


FIGURE 21-3

3. Drag and drop the fields in the **Manage Form Fields panel** to reorder them.

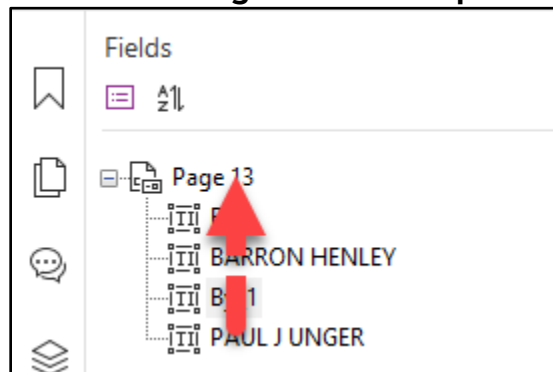


FIGURE 21-4

## Format Fields Properly

To change the formatting of any field, right-click on it in the **Manage Form Fields panel** to open the properties. From here you can change the font, font size, and other formatting options.

## Name Fields Properly

PDF Editor looks at the text of the form to guess what fields should be called, and it isn't always right. If you see any fields that do not have useful names, right click on them in the **Manage Form Fields panel** to open the properties and rename them as appropriate.

## Add A Submit Button to Your Form

Your form can be distributed to recipients via email and the completed PDF can be emailed back to you (rather than the form itself). To create the submit button, follow these steps:

1. Add a new button.

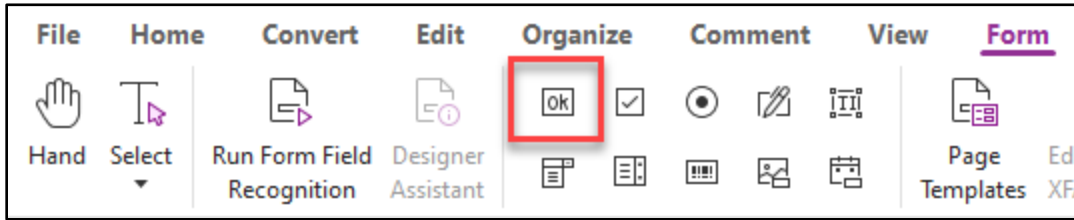


FIGURE 21-5

2. Double click the button you've made and the Button Properties dialog will appear. On the **Options** tab, give the button a **Label**.

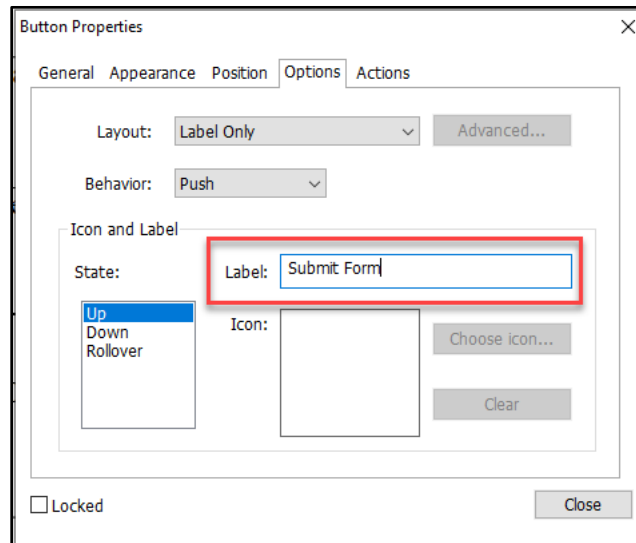


FIGURE 21-6

3. On the **Actions** tab, select the **"Mouse Up" trigger**, select the **"Submit a form" action** and click the **Add button**.

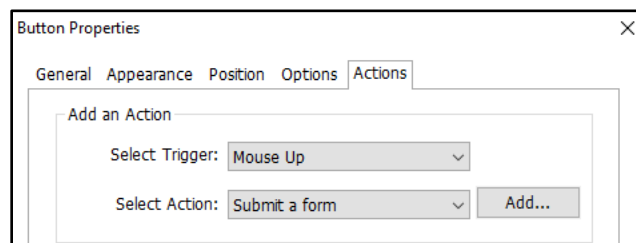
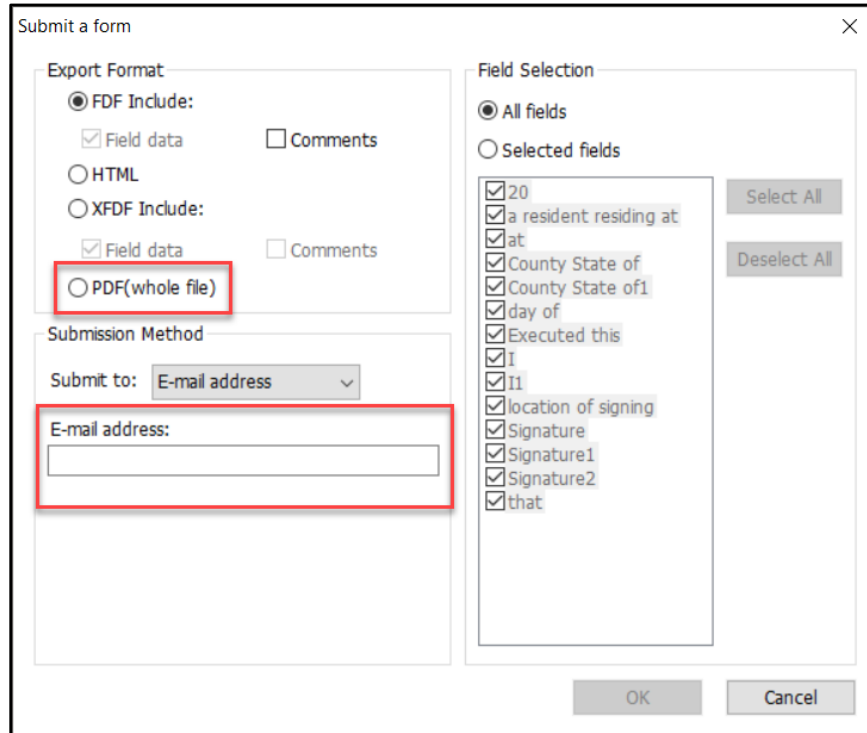


FIGURE 21-7

4. When you click Add, you'll see the following dialog. Choose **PDF (whole file)** which is the default. Then enter the email address under the Submission Method.



Submit a form

**Export Format**

☒ FDF Include:

☒ Field data ☐ Comments

☐ HTML

☐ XFDF Include:

☒ Field data ☐ Comments

☐ PDF(whole file)

**Field Selection**

☒ All fields

☐ Selected fields

☒ 20

☒ a resident residing at

☒ at

☒ County State of

☒ County State of1

☒ day of

☒ Executed this

☒ I

☒ I1

☒ location of signing

☒ Signature

☒ Signature1

☒ Signature2

☒ that

**Submission Method**

Submit to: E-mail address

E-mail address:

OK Cancel

FIGURE 21-8

5. Now click the **OK** button, then the **Close button** at the bottom of the dialog.

# CHAPTER 22

## HEADERS, FOOTERS, & BATES NUMBERING

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Headers and footers are often included in PDFs to add bates numbering, simple page numbering, or document content.

### Headers and Footers

To add a header or footer (see below for Bates numbering) to a PDF:

1. **Organize ribbon → Headers & Footers button → Add.**

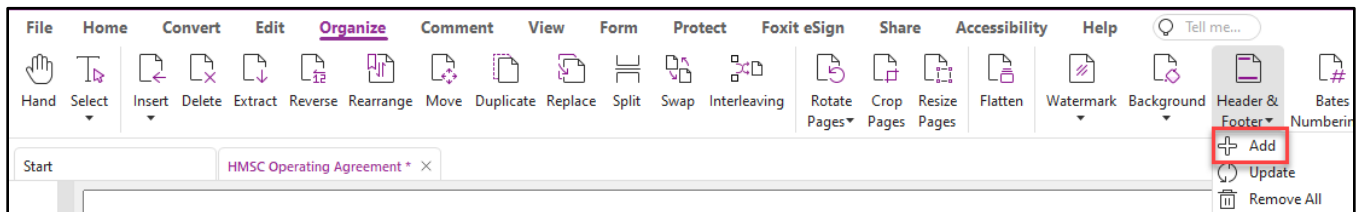


FIGURE 22-1

2. Select the desired font and font size.

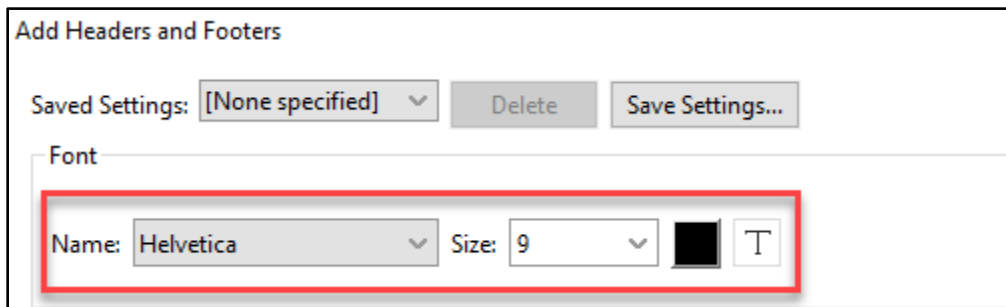


FIGURE 22-2

3. Place the cursor in the appropriate position - left aligned, centered, or right aligned in the header or footer.

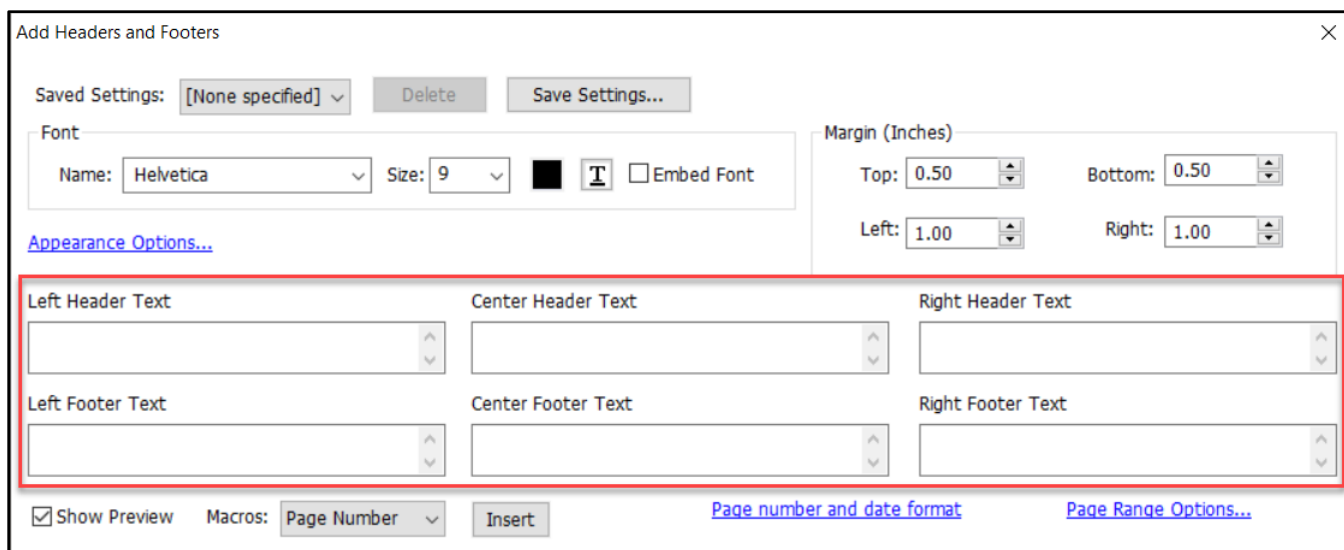


FIGURE 22-3

4. To add page numbering or document information, such as the file name, click on the **Macro button** and select the appropriate option.

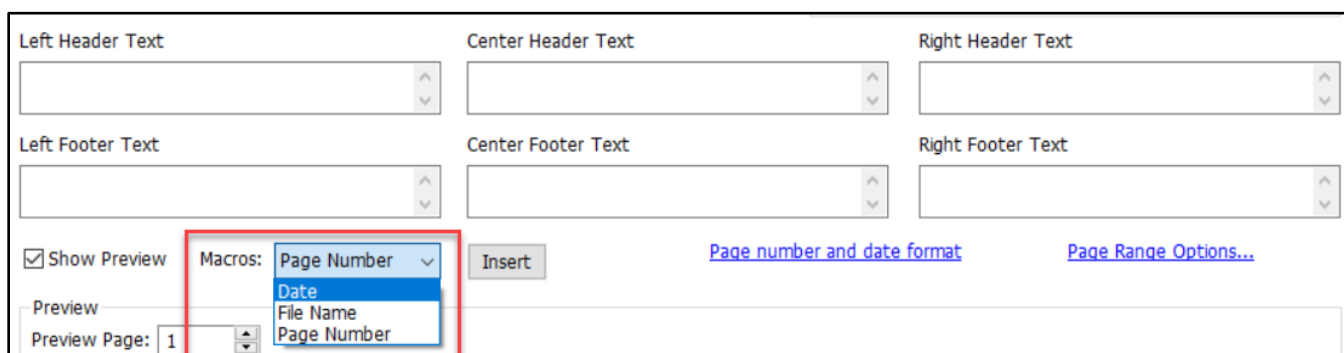


FIGURE 22-4

5. To change how dates or page numbering is formatted, click on the **Page number and date format button** and make the appropriate changes.

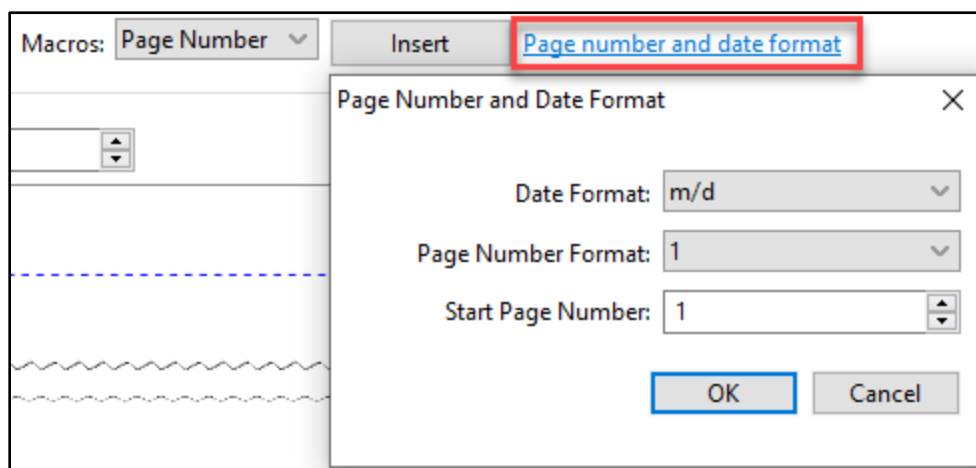


FIGURE 22-5

6. Click on the **Insert button** to insert the text.
7. If inserting static text, type the text directly in the appropriate text box (for left aligned, centered, or right aligned text in the header or footer).
8. If the contents of the PDF need to be shrunk to make space for the header and footer, click on the **Appearance... link** and check the box.

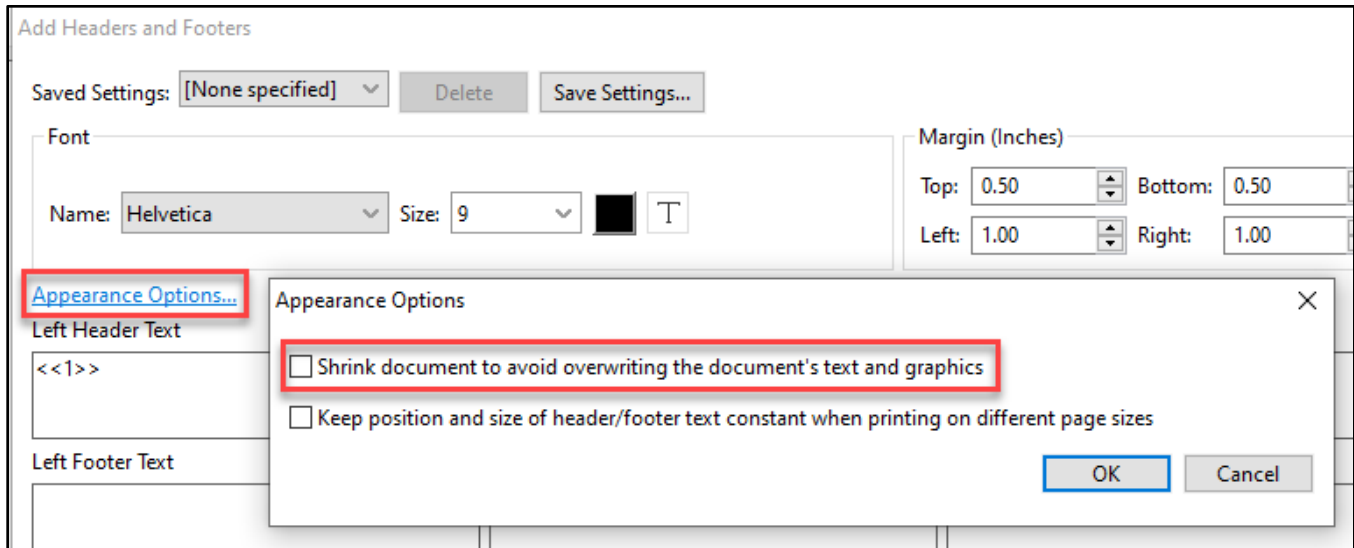


FIGURE 22-6

## Bates Numbering

Bates numbers appear as headers or footers on the pages of each PDF in the batch.

1. Open the desired PDF.
2. Select **Organize ribbon** → **Bates Numbering button** → **Add**.
3. Add any files to the list that you want to Bates Number and click **OK**.

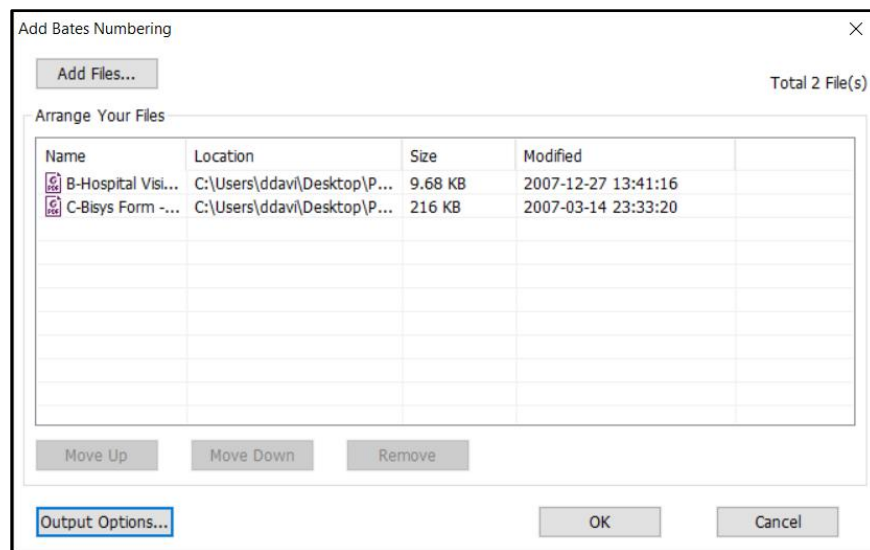


FIGURE 22-7

4. Select desired font.
5. If you want to shrink the document to make room for the Bates number, select **Appearance Options**, and check **Shrink document to avoid overwriting the document's text and graphics**.
6. Place your cursor inside the Right Footer position (or whatever desired location) and click **Insert** (be sure it is set to the Bates Number Macro (see below screen shot).
7. Click **OK**.

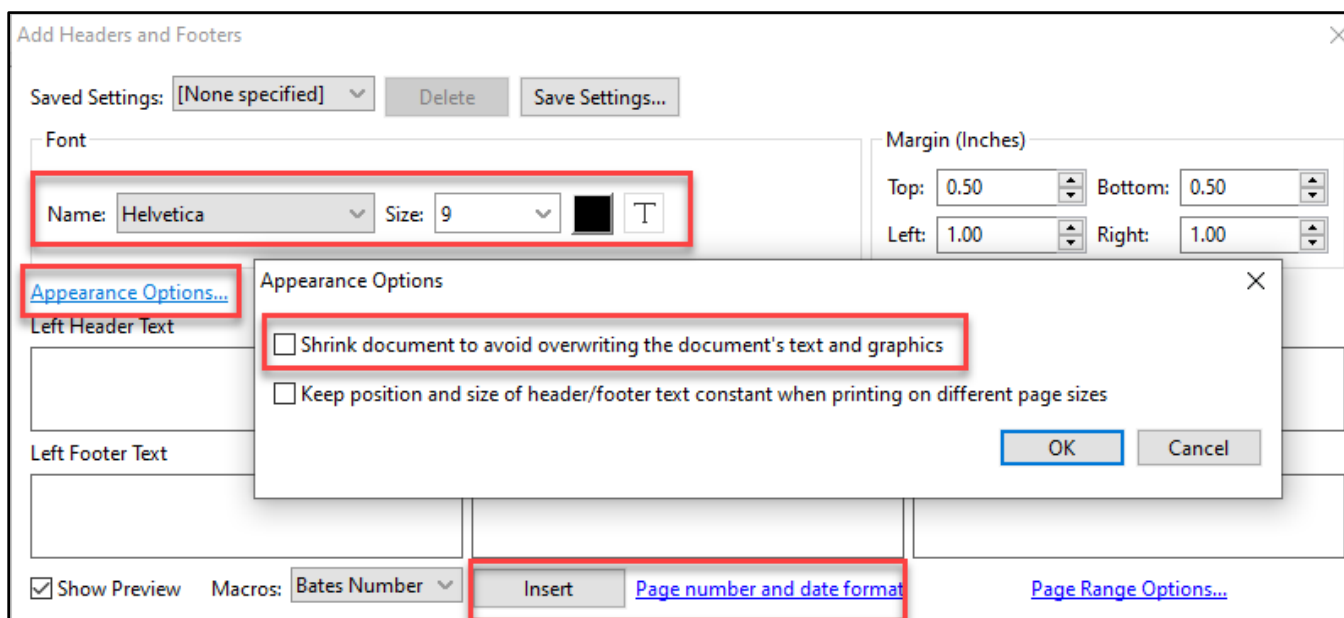


FIGURE 22-8



# LEAVE THE TRAINING TO US.

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- Comprehensive digital courses
- Affordable membership plans
- On-demand training videos
- Live training sessions
- “Ask the Expert” sessions
- Customizable training plans

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