

PreLien2Lien Quick Start Guide

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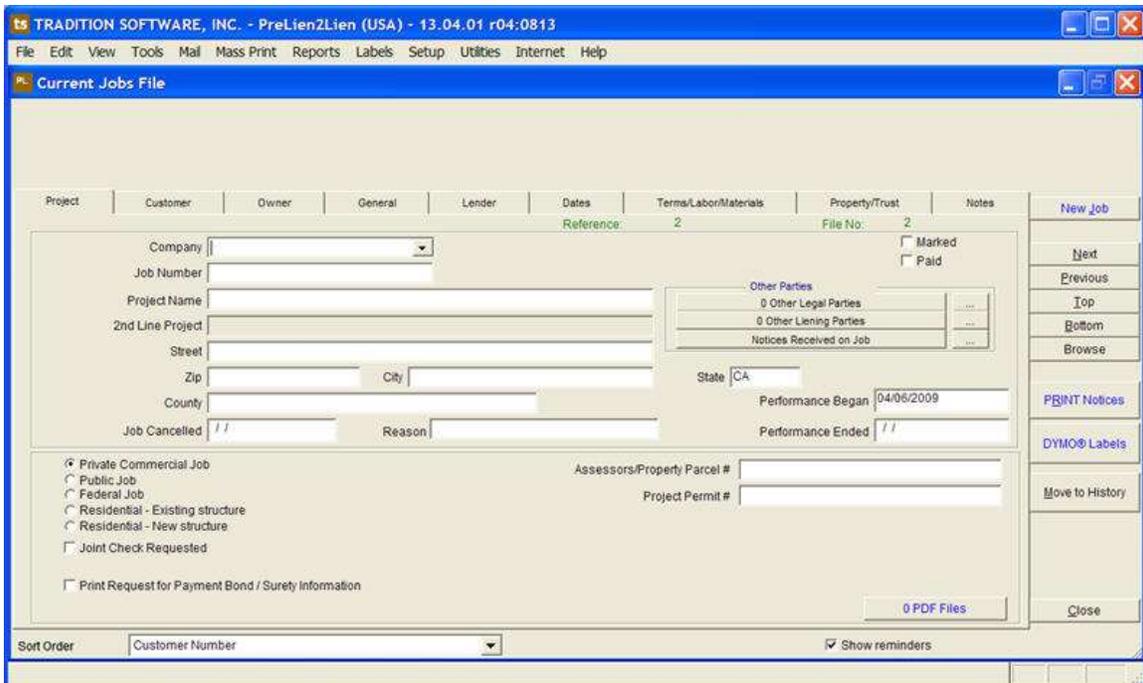
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This guide will help you with the basics of printing of a notice in Prelien2Lien. This can be done in **3 easy steps**:

- 1. Create A Job.**
- 2. Lien Reminder System**
- 3. Print A Notice**

Let's start by **Creating A Job...**

STEP 1: CREATING A JOB

Once you have installed the software, it is time to create your first job in PreLien2Lien.

THE CURRENT JOBS FILE

The screenshot shows the 'Current Jobs File' window in the PreLien2Lien software. The window title is 'TRADITION SOFTWARE, INC. - PreLien2Lien (USA) - 13.04.01 r04:0813'. The menu bar includes File, Edit, View, Tools, Mail, Mass Print, Reports, Labels, Setup, Utilities, Internet, and Help. The window contains several tabs: Project, Customer, Owner, General, Lender, Dates, Terms/Labor/Materials, Property/Trust, and Notes. The 'General' tab is active, showing fields for Company (dropdown), Job Number, Project Name, 2nd Line Project, Street, Zip, City, State (CA), County, Job Cancelled (//), Reason, Performance Began (04/06/2009), Performance Ended (//), Assessors/Property Parcel #, and Project Permit #. There are also checkboxes for 'Marked', 'Paid', 'Private Commercial Job', 'Public Job', 'Federal Job', 'Residential - Existing structure', 'Residential - New structure', 'Joint Check Requested', and 'Print Request for Payment Bond / Surety Information'. A 'New Job' button is located in the upper right corner. The bottom of the window has a 'Sort Order' dropdown set to 'Customer Number' and a 'Show reminders' checkbox checked.

To create a new job, you must be in the **Current Jobs File**. This is where you will do the bulk of your work in the program. Here you will enter and edit information about jobs that are still in progress or have not been paid. To create a new job, click the blue **"New Job"** button in the upper right hand corner.

This will create a blank record in the program for you to enter information about your new job. Before printing out a notice, there are several things you want to define about this job: **The Project, The Owner, The General, & The Lender.**

First, we want to define **The Project...**

THE PROJECT

The screenshot shows the 'PreLien2Lien' software interface. The title bar reads 'TRADITION SOFTWARE, INC. - PreLien2Lien (USA) - 13.04.01 r04:0813'. The menu bar includes File, Edit, View, Tools, Mail, Mass Print, Reports, Labels, Setup, Utilities, Internet, and Help. The window title is 'Current Jobs File MOUNTAIN RIDGE COUNTRY CLUB'. The 'Lien Reminder System' section has radio buttons for 'Prime Contractor' and 'Subcontractor'. The main form is divided into several sections: 'Project' (Company: TOM'S DRYWALL SUPPLY, Job Number: 45), 'Customer' (Project Name: MOUNTAIN RIDGE COUNTRY CLUB, 2nd Line Project: Snackhouse project), 'Owner' (Street: 223 Indiana Ave, Zip: 94555, City: Fremont, State: CA, County: Alameda), 'General' (Performance Began: 03/19/2009, Performance Ended: //), 'Lender' (Assessors/Property Parcel #: 1234-009-12-134, Project Permit #: 4567-RC), and 'Dates' (Reference: 4860, File No: 4860). There are also checkboxes for 'Marked', 'Paid', 'Other Parties', 'Other Legal Parties', 'Other Liening Parties', and 'Notices Received on Job'. A 'Print Request for Payment Bond / Surety Information' checkbox is at the bottom. A 'Sort Order' dropdown and 'Show reminders' checkbox are at the bottom left. A '0 PDF Files' button and 'Close' button are at the bottom right. A vertical toolbar on the right contains buttons for 'New Job', 'Next', 'Previous', 'Top', 'Bottom', 'Browse', 'PRINT Notices', 'DYMOS Labels', and 'Move to History'.

The **Project** tab is where you will provide information about the project your company provided equipment, labor or materials for.

Here are the things you definitely need to fill out on this tab:

1. **Company:** Your company or the company you are generating notices for.
2. **Project Name:** The name of the project you provided work for.
3. **Street/Zip Code/City/State/County:** The location of the project.
4. **Performance began:** The first day you provided equipment/service/labor/materials.
5. **Job Type:** private, public, federal, residential existing, or residential new.

Next, we want to define **The Customer...**

THE CUSTOMER

The screenshot shows the 'Current Jobs File MOUNTAIN RIDGE COUNTRY CLUB' window. The 'Customer' tab is active, displaying the following information:

Project	Customer	Owner	General	Lender	Dates	Terms/Labor/Materials	Property/Trust	Notes	
	MOUNTAIN RIDGE COUNTRY CLUB								
Customer Number	1334-1402								
1 Customer	MOUNTAIN RIDGE CORPORATION								
2nd Line Customer									
2 Street	7008 Salem Avenue								
Zip	95747	City	Roseville	State	CA				
Phone	(800) 886-8770	Fax	(916) 724-5997						
3 Estimated Amount	10000.00	AR #							
4 Balance Due	5636.23	PO #							
Terms									
Print Options		Certs/First Class Mail							
Copies		1							
DYMOS Label									
Sort Order		Customer Number						Show reminders	

The **Customer** tab will always include information about the company that owes you money or that you are in direct contract with. Make sure to fill out:

1. **Customer:** The name of the company.
2. **Street/Zip/City/State/Phone:** Their location & contact number.
3. **Estimated Amount:** The estimated cost of job at the beginning of the project.
4. **Balance Due:** If there is a balance due, put in the amount of money they owe you. If no balance is due yet, leave this blank.

Next, you must define **The Owner...**

THE OWNER

ts TRADITION SOFTWARE, INC. - PreLien2Lien (USA) - 13.04.01 r04:0813

File Edit View Tools Mail Mass Print Reports Labels Setup Utilities Internet Help

Current Jobs File MOUNTAIN RIDGE COUNTRY CLUB

Lien Reminder System

Contractor Type:
 Prime Contractor
 Subcontractor

Show Reminders

Project Customer Owner General Lender Dates Terms/Labor/Materials Property/Trust Notes

MOUNTAIN RIDGE COUNTRY CLUB

1 Owner JOHNSON INVESTMENTS Find

2nd Line Owner A DIVISION OF MOUNTAIN RIDGE CORPORATION

2 Street 1760 Industrial Avenue

Zip 95610 City Citrus Heights State CA

Phone () - Fax () -

Contract Number Enter Tenant

Print Options
Copies 1 Certified/First Class Mail

Certified Number
1st Notice 7004 1160 0006 8559 9914

Dymo Label

Sort Order Customer Number Show reminders

New Job
Next
Previous
Top
Bottom
Browse
PRINT Notices
Dymo Labels
Move to History
Close

The **Owner** tab contains information on the person or business that owns the property where you performed work/labor or provided service/materials. This may be the same person as **The Customer** depending on the situation. Make sure to fill out:

1. **Owner:** the name of the person or business that owns the property.
2. **Street/Zip/City/State/Phone:** Their business location and phone number.

Next, you want to define **the General**.

THE GENERAL

The **General** tab is where you put information for the General Contractor of the Project (if there is one). This may be the same person as **the Customer** depending on the situation. Either way, make sure to fill out these fields:

1. **General Contractor:** The general contractor for the project.
2. **Street/Zip/City/State/Phone:** Their business location and contact number

The screenshot shows the 'PreLien2Lien (USA)' software interface. The main window title is 'Current Jobs File MOUNTAIN RIDGE COUNTRY CLUB'. The 'Lien Reminder System' is active, with 'Prime Contractor' selected. The 'General' tab is selected, showing the following information:

Project	Customer	Owner	General	Lender	Dates	Terms/Labor/Materials	Property/Trust	Notes	
			MOUNTAIN RIDGE COUNTRY CLUB						
1	General Contractor		MCKENNA GENERAL CONSTRUCTION						
	2nd Line General								
2	Street		1015 South Jefferson						
	Zip		60510	City			Batavia	State	IL
	Phone		(630) 555-1212	Fax			(630) 444-4444		
	Contract Number								

Print Options: Copies: 1, Certified/First Class Mail:

Certified Number: 1st Notice: 2222 4444 2323 4465

Buttons: DYMOLabel, Show Reminders, New Job, Next, Previous, Top, Bottom, Browse, PRINT Notices, DYMOLabels, Move to History, Close

Sort Order: Customer Number, Show reminders:

Next, you want to define **The Lender**.

THE LENDER

The screenshot shows the 'Lender' tab in the PreLien2Lien software. The window title is 'TRADITION SOFTWARE, INC. - PreLien2Lien (USA) - 13.04.01 r09:1608'. The menu bar includes File, Edit, View, Tools, Mail, Mass Print, Reports, Labels, Setup, Utilities, Internet, and Help. The current job is 'MOUNTAIN RIDGE COUNTRY CLUB'. The 'Lender' tab is active, showing the following information:

- Contractor Type: Prime Contractor, Subcontractor
- Project: MOUNTAIN RIDGE COUNTRY CLUB
- Lender or Surety: WELLS FARGO BANK
- 2nd Line Lender: (empty)
- Street: 45 Fremont Street, 2nd Floor
- Zip: 94105
- City: San Francisco
- State: CA
- Phone: () - () - () - () - () - ()
- Fax: () - () - () - () - () - ()
- Bond Number: (empty)
- Print Options: Copies: 1, Certified/First Class Mail
- Certified Number: 1st Notice: 2222 4444 2323 4467
- DYMO® Label: (empty)

Navigation buttons on the right include: Show Reminders, New Job, Next, Previous, Top, Bottom, Browse, PRINT Notices, DYMO® Labels, Move to History, and Close. A 'Sort Order' dropdown is set to 'Customer Number' and a 'Show reminders' checkbox is checked.

The **Lender** tab includes information about the person or business that provides financing for the project (bank, mortgage company, individual, etc.). Your project may not have a lender but if it does, you need to fill out this information:

1. **Lender or Surety:** The name of the person or business providing financing.
2. **Street/Zip/City/State/Phone:** Their business location and contact number.

The next step? Using **The Lien Reminder System**.

STEP 2: THE LIEN REMINDER SYSTEM

The screenshot displays the 'PreLien2Lien (USA) - 13.04.01 r09:1608' application window. The title bar indicates the current file is 'Current Jobs File MOUNTAIN RIDGE COUNTRY CLUB'. A red arrow points to the 'Lien Reminder System' tab, which is active. The interface includes a menu bar (File, Edit, View, Tools, Mail, Mass Print, Reports, Labels, Setup, Utilities, Internet, Help) and a toolbar with 'Show Reminders'. The main form area is divided into several sections: 'Contractor Type' with radio buttons for 'Prime Contractor' and 'Subcontractor'; a grid with columns for Project, Customer, Owner, General, Lender, Dates, Terms/Labor/Materials, Property/Trust, and Notes; a detailed project information section with fields for Company (TOMFS DRYWALL SUPPLY), Job Number (45), Project Name (MOUNTAIN RIDGE COUNTRY CLUB), 2nd Line Project (Snackhouse project), Street (223 Indiana Ave), Zip (94555), City (Fremont), State (CA), County (Alameda), Job Cancelled (//), Reason, Performance Began (03/19/2009), Performance Ended (//), Assessor's/Property Parcel # (1234-009-12-134), and Project Permit # (4567-RC); and a section for job types with radio buttons for 'Private Commercial Job', 'Public Job', 'Federal Job', 'Residential - Existing structure', and 'Residential - New structure', along with a checkbox for 'Joint Check Requested' and a checkbox for 'Print Request for Payment Bond / Surety Information'. A '1 PDF Files' button is visible at the bottom right of the form. The status bar at the bottom shows 'Sort Order' set to 'Customer Number' and a checked 'Show reminders' option.

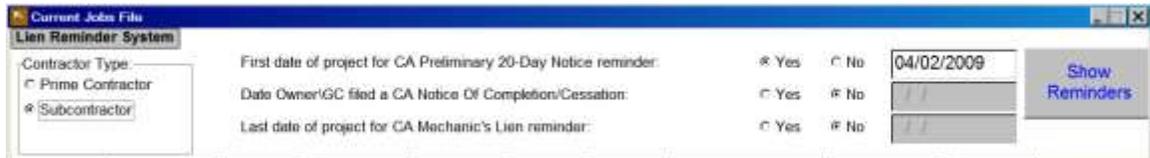
The **Lien Reminder System** is a new feature in the program that sits on the top of the **Current Jobs** file. This system will help you determine what kind of notice you have to print and when you have to mail it by. The system currently works for private and residential jobs but public and federal jobs will be added in the future.

To use the system, you need to define your **Contractor Type** and your **Critical Dates**.

CONTRACTOR TYPE & CRITICAL DATES



Before the **Lien Reminder System** can tell you what notice you have to print, you have to indicate whether you are a contractor or subcontractor for the job. Click the circle that applies to you.



Once you have selected your **Contractor Type**, the program will ask you for several **Critical Dates** of the project. If you have a date, click yes and enter the date in the field provided. If you don't have a date yet (like project of completion or last date of project) click no. After you have entered all the dates you have for the project, click **Show Reminders**.

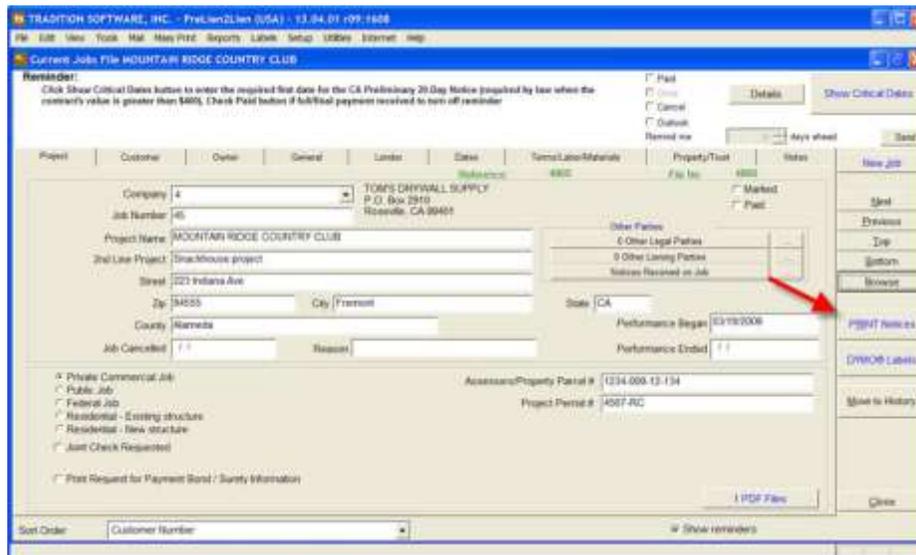


The program will use the **Contractor Type** and **Critical Dates** you provided to tell you what notice you need to print and when it has to be delivered by in a small paragraph. There are several check boxes to the right you can click:

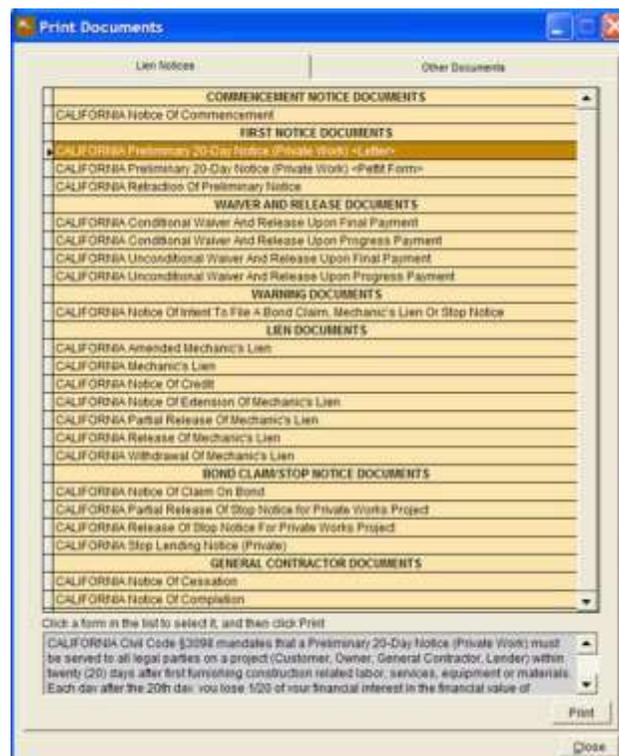
1. **Paid:** Mark this if the project has been paid off.
2. **Done:** Once you have printed and delivered a notice, click this to see what you have to do next.
3. **Cancel:** Cancels the reminder.
4. **Outlook:** Allows you to create a reminder in Outlook. Just check the box, select how many days before you want to be reminded and hit send. It will send the reminder to outlook.

Now that you know what notice to print, it's time to **Print A Notice**.

STEP 3: PRINTING A NOTICE



To print a notice, click the **Print Notices** button in the **Current Jobs File**.



When you click **Print Notices**, it will bring up the **Print Documents** menu. This menu lists all the notices you can print for a particular state. Click on the name of the notice you need to print and hit the print button in the lower right hand corner.

THE PRE-PRINT PREVIEW MENU

BALANCE OPTIONS	
Estimated amount (\$)	\$10,000.00
CONTRACT OPTIONS	
Beginning date	03/19/2009
MAILER OPTIONS	
Mailer name	Mary Johnson
Mailer title	Assistant
Mailer city	Roseville
Mailer state	CA
Mail date	04/12/2009
PROJECT OPTIONS	
Assessors/Property Parcel #	1234-009-12-134
SIGNER OPTIONS	
Signer name	Ted McKenna
Signer title	CFO

Estimated amount (\$)
10000.00

PRINTING DEFAULT OPTIONS

- Do Not Print, Rebuild Certified List Only
- Mark Printed Records
- Show Print Preview Before Printing
- Print Headers on Forms
- Create PDF backup
- Include Agent Verification
- Mass print

LETTER OPTIONS

- Print an Owner Letter
- Print a Recorder Cover Letter

ADDITIONAL OPTIONS

1 Additional Copies with Estimated Amount

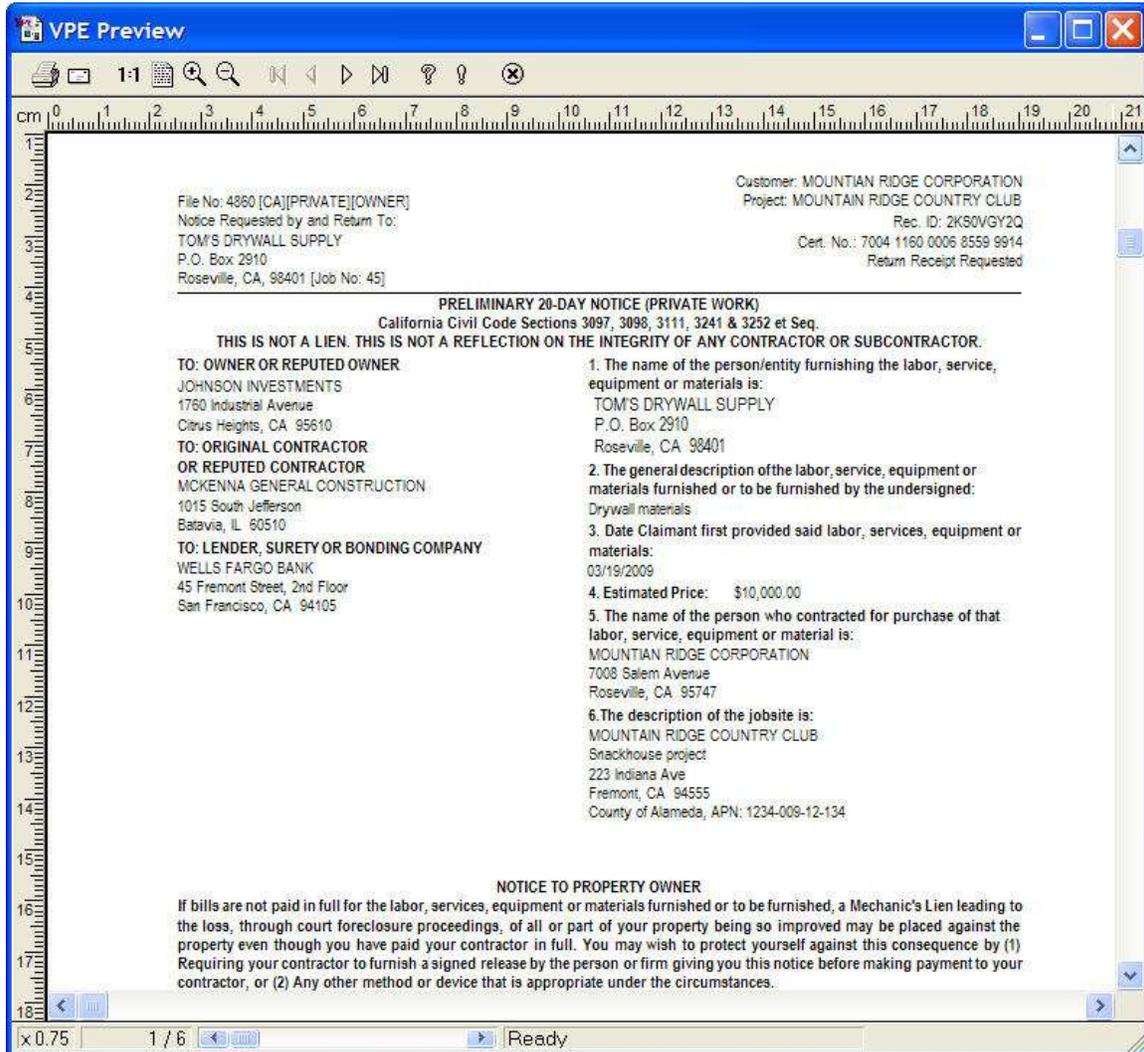
1 Additional Copies without Estimated Amount

Cancel Print

When you click **Print** in the **Print Documents** menu, it won't automatically print out the notice. Instead, it will take you to the **Pre-Print Preview Menu**. This screen provides one last chance to review information for the notice and change. You can click on any information field in the orange box and a white field will appear below to change the information. You can also change printing settings and letter options below.

Once you have checked everything over, press the **Print** button in the lower right hand corner.

PRINT PREVIEW



When you press **Print**, it will generate a preview of the notice. Look over the notice and make sure all the information is correct. If everything looks right, then click the **Print Icon** in the upper left hand corner.

Once you do that, you will have successfully printed a legal notice in **PreLien2Lien**.