



New User Quick Start Guide

Welcome to Paragryn! Experience the Elation of Continuous Synchronization™.

This guide will walk you through installation, onboarding, and training to ensure a seamless experience with Paragryn.

Before You Start

System Requirements

- **Microsoft Word:** Version 2016 or newer.
 - **Microsoft 365 Account:** Required for access to MS Word Add-in.
 - **Free Disk Space:** At least 300 MB on each user's device.
 - **Firewall/VPN Configuration:** Ensure these allow Paragryn to access servers.
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Installation Steps

Step 1: Install the Paragryn Application

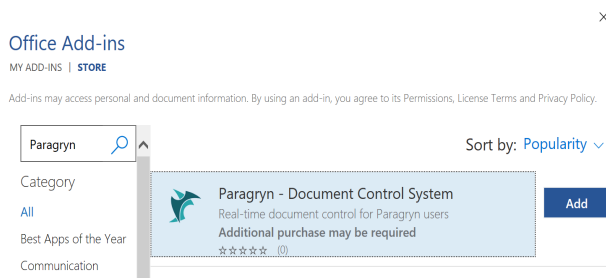
1. Open the installer file downloaded from paragryn.com when you purchased your subscription. If you need another copy of the installer you can log into the Paragryn website (paragryn.com) using the serial number provided in your purchase order confirmation email.
2. Install the application:
 - On **PC**: During installation, if prompted about an unknown publisher, click "More" and then "Install Anyway".
 - On **Mac**: Right-click the Paragryn App in Finder and select "Open".
 - Note: The application may take 10-15 seconds to open.

Step 2: Install the Word Add-in

1. Open a Microsoft Word docx document.
2. Go to Home > Add-ins > Get Add-ins.



3. Search for and install the Paragryn Add-in.



4. Insert the Add-in into the MS Word document you wish to template.



5. Sign in to the Add-in using your Paragryn credentials.

Key Features Overview

Desktop Application Overview

- **Projects Panel:** Organize and manage client folders.
- **Documents Panel:** Access and edit specific files.
- **Data Panel:** Manage entities and fields.
- **Fields Page:** Create and edit fields.
- **Settings Page:** Update account settings and report issues.

MS Word Add-in Overview

- **Field Insertion:** Insert text, entity, and list fields into Word documents.
 - **Field Data Entry:** Use the Add-in to add, update, and save data for fields.
 - **Strip & Merge Functions:** Manage data integrity when moving documents between projects.
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Most Important Tips

1. **Forms Management:**
 - Store master forms in a separate, “safe” folder (your Paragryn Forms Library).
 - Only use copies of forms for client projects, not the master forms.
 2. **Folder Watching:**
 - Do not watch your Paragryn Forms Library folder.
 - Do not watch your main folder that contains your various client subfolders.
 - Watch individual client project folders to sync client-specific data.
 3. **Field Usage:**
 - Avoid duplicating entities for the same person or organization.
 - Use AKA fields for variations in entity names.
 4. **Document Data:**
 - Always open, save, and close documents to ensure data synchronization.
 - Be cautious with the Strip & Merge function when bringing documents from one project into another project.
 5. **Troubleshooting:**
 - Check internet connection, firewall settings, and restart the app if issues arise.
 - Use the Bug Report feature in settings for persistent problems.
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More detailed support articles can be found at Paragryn.com. For additional questions or support, contact Paragryn at **support@paragryn.com**.

Paragryn also offers templating services for a fee. Please contact us for a quote.

We are here to make your workflow seamless and efficient!
