

Prepare the form.

Preserve the finished record.

Final Exhibit | iPhone, iPad, and Mac Catalyst

Form Generator guide | Review draft | October 29, 2026

Choose an available return, statement, due-diligence report, or California form. Reuse supported identity and client information, enter the assignment facts, capture the appropriate signatures, and review the completed PDF before saving or sharing.

Drafts and completed documents are different

The Form Generator notice says completed forms are not automatically saved. Several editors do save working drafts, but a draft is not a final PDF in Evidence Locker, an exported file, a delivered attachment, or a filed form. Preserve the completed output explicitly before starting the next matter.

SETTING / CONTROL	WHAT TO DO AND WHY
Open on iPhone / iPad	Use Form Generator in Evidence Locker. The mobile launcher requires Pro; Free opens the upgrade flow.
Open on Mac	Select Form Generator in Command Center. It loads the shared form-selection screen and form editors. The supplied Mac sidebar path has no matching explicit Pro gate, so verify access with a release Free build.
What the app checks	Some forms validate required fields and selected options. Validation is not a factual investigation, identity check, or determination that a particular service method or document is legally sufficient.
What the app creates	The documented form workflows create PDF output. They are not a universal editor for arbitrary uploaded Word/PDF templates, nor a promise of Word export for every generated form.

Inside this chapter

2 Select the form | 3 Reusable setup
4 Returns and affidavits | 5 Attempts, signatures, and validation
6 General Due Diligence | 7 POS-010
8 POS-020 and POS-020(D) | 9 POS-030
10 California Due Diligence | 11 General Statement
12 Interview recording | 13 Preserve and deliver
14 Platform differences and review checklist

Review draft checked against MetaStamp.zip and the actual form destinations in FormGeneratorView.swift. Xcode target configuration, the Core Data model, release identification, and representative installed-device tests remain needed. Android PDFs supply visual consistency, not Apple feature assumptions.

02 Select the right form



SETTING / CONTROL	WHAT TO DO AND WHY
Affidavit Type	Return of Service: Individual; Affidavit of Non-Service; Return of Service: Business/Corporation; Posting Service. These open the shared return editor, titled Florida Service Return.
General Statement	Written statement, provider and interviewer details/signatures, optional separate incident details, certification/notary block, and optional interview recording.
Due Diligence	General individual/business due-diligence report using selected inquiries/actions and entered results. This is separate from California Declaration of Due Diligence.
California Form	POS-010 Proof of Service of Summons; POS-020 Proof of Personal Service, Civil; POS-020(D) Documents Served Attachment; POS-030 Proof of Service by First-Class Mail, Civil; California Declaration of Due Diligence.

Continue to the editor

Choose Form Type, then Affidavit Type or California Form when shown. Review the applicable setup sections, then choose Continue to Form. Affidavit forms require a saved jurisdiction and the matching saved language before continuation is enabled. Use the separate Set Up Affidavit Language link if needed.

A form title does not authorize the underlying action

Select a form that fits the actual assignment and applicable requirements. The general-return destination is specifically titled Florida Service Return and uses a bundled Florida template. Editing State or jurisdiction or custom language does not establish suitability for another jurisdiction.

03 Save reusable form information

SETTING / CONTROL	WHAT TO DO AND WHY
Process Server Information	For Affidavit and California Forms, open Set Up Process Server Information or Review Process Server Information. Save process server name; badge/license/certification/appointment number; company; business/mailling address; phone; email. Use Save Process Server Information and check the saved confirmation.
Professional Profile is separate	Global export identity and PDF branding live in Professional Profile. Process Server Information is a separate form-prefill record. Do not assume editing one automatically replaces every field in the other.
Affidavit Language	Enter State or jurisdiction and review Individual Service, Substitute Service, Registered Agent Service, Posted Service, Non Service, and Return Certification. General examples are starting text. Choose Save Return Language or Update Return Language.
Required language by selection	Individual needs saved Individual Service or Substitute Service language; Non-Service needs Non-Service language; Business/Corporation needs Registered Agent Service language; Posting needs Posted Service language. The main screen also requires a saved jurisdiction.
California Service Settings	Set Registered California Process Server when applicable, Registration number, County of registration, and California Global Language. Choose Save California Settings. These are supplemental defaults; do not assume they populate every editor identically.
Client / attorney profiles	Supported form pickers can reuse client or attorney details. The supplied mobile profile editor has This client is an attorney and optional Bar number. The supplied Mac profile editor lacks those setup controls; verify the saved profile and available picker choices.

Prefill saves time, but review each field

When preparing the next return, reuse the process server identity and agreed wording, then enter the actual case, documents, recipient, method, date/time, address, attempts, and observations. A saved client case-number default may belong to another matter. Recheck restored drafts before accepting any prefilled values.

Save the setup explicitly

These setup screens have save actions. A character counter in Affidavit Language is not a verified maximum-length guarantee. California supplemental language is described as additional text, not a replacement for mandatory form wording. Review the actual completed document.

04 Complete a return or affidavit

1. Select the Affidavit Type and complete required language setup.
2. In Florida Service Return, verify the displayed return/service selection.
3. Enter the case, client, attorney where relevant, documents, and service facts.
4. Review the generated narrative, saved language, attempts, and additional statement.
5. Capture the signature, validate, preview, and preserve the PDF.

SETTING / CONTROL	WHAT TO DO AND WHY
Return Information	State or jurisdiction, County or district, Judicial circuit, and Court name. Fresh-form code starts with Florida. The output uses the bundled FloridaServiceReturn.pdf template.
Case Information	Case or file number, parties, client name/company, plus a saved Client Profile selection. Check the correct matter after applying a profile.
Attorney Information	Choose a supported attorney profile or enter attorney name, firm/office, bar number, address, phone, and email. A profile selection is not attorney verification.
Process Service Contact Information	Use Default Process Server Information can reuse saved identity/contact fields. Review the actual server and Job number. Turning defaults off permits case-specific entries.
Service Information	Documents and person/entity, process-received date/time, service date/time, address, method, and relevant recipient/authority fields. The editor includes Individual Service, Substitute Service, Posting, Registered Agent, and Authorized Service.
Physical description	Optional Include Physical Description exposes sex, race, age, height, weight, hair, eyes, glasses, and other description. Record observed facts; do not infer missing facts from a profile.
Language and additional facts	Additional Return Language can be edited; Restore Saved Language replaces it from the saved setup. Additional Statement holds case-specific explanations. Review what the generated narrative actually states.

Different method, different facts

An individual return identifies the person served. Substitute service asks about the accepting person and relationship. Business/registered-agent service asks about authority. Posting and non-service document attempts/results. Only choose factual options you can support; a completed field does not verify the event.

Before and after drafting

Preserve each completed case output before Reset Form or starting another matter. Reuse professional defaults, not another assignment's service observations, signatures, or case number. Reports and billing remain separate Case File workflows.

05 Attempts, signatures, and validation

SETTING / CONTROL	WHAT TO DO AND WHY
Posting Service attempts	The supplied editor requires First Attempt and Second Attempt results, offers Add Optional Third Attempt, and includes at most the first three posting attempts in its output data. If the optional third contains information, its result is required.
Other attempts / Non-Service	Use Include service attempts where offered, then Add Service Attempt and record date/time, location, and result. Non-Service validation requires at least one completed result. Blank-result rows can be omitted from output.
Process Server Signature	Draw in the signature area. Mobile help allows finger/Apple Pencil on supported devices; Mac help specifies mouse/trackpad. Clear Signature clears strokes and associated captured signing information.
Confirm Signature	Captures the current signature date. With Add date, time, and GPS coordinates enabled, it requests a signing location and stores available values. Check the displayed metadata before export.
Signing metadata	This return's display can show date/time without coordinates if GPS was not obtained. It differs from the scanner's strict GPS-before-placement behavior and California forms' validation rules.
Certification / Notary Block	Include return certification uses saved certification language; enabling it with blank language can fail validation. Include optional notary block adds a block, not a completed notarization.
Validate Form	Checks the current form's code-defined fields. General returns require server, case/file number, person/entity, documents, address, and method-specific facts. Validation is not a review of every factual or legal requirement.

Method-specific validation in this build

Individual requires the recipient name. Substitute checks recipient name, relationship, and the editor's three affirmative recipient-condition answers. Registered Agent requires accepting person and authority/title. Authorized Service requires its details. Posting requires placement details and the first two attempt results. These describe app checks, not a statement of the rules for every assignment.

Check signatures yourself even after validation

The general-return validation function does not require a drawn signature or confirmed signing date in the same way the California form validators do. Review the signature, actual date, certification, and completed output yourself before delivery. Signing time/location must not be confused with service time/location.

06 General Due Diligence

Choose Form Type: Due Diligence. This builds a general report of entered inquiries and actions, distinct from a chronological service return and the California-specific declaration.

1. Complete Report Information, jurisdiction/court, client/case, and Subject Information.
2. Review Process Server details or enable Use Default Process Server Information.
3. Select Individual, Business / Corporation, or the applicable combination.
4. Mark only the actions actually performed and enter results. Use Other and Additional Due Diligence Information as needed.
5. Capture the signature, preview, then save or export.

SETTING / CONTROL	WHAT TO DO AND WHY
Individual inquiries	The source offers USPS inquiry; property, court, corrections, and voter records; telephone directory; internet/public records; relatives/associates; employer; neighbors; other addresses; investigative databases; physical attempts; and Other.
Business inquiries	Includes Sunbiz/corporate information, registered agent, principal address, business address, telephone, internet/public records, physical attempts, and Other. These choices describe documentation fields, not automated database searches.
Results	Each selected inquiry/action has space for the result. Document the source and outcome accurately. The app does not perform the inquiry merely because the option is selected.
Validation	Before generating, requires a process server name, individual/business name, at least one due-diligence type, and at least one selected item or additional information. It does not verify the investigation was exhaustive.
Signature	Draw the process server signature and use Clear Signature if replacing it. The supplied general Due Diligence editor does not expose the California Confirm Signature/GPS controls.
Output actions	Preview PDF; Save to Evidence Locker; Export, Share, or Print PDF. The saved PDF is separate from the working draft and any Case File evidence links.

A practical unsuccessful-address inquiry

Record what you checked at the address and through the sources actually used. Include the relevant results and dates in the available narrative/results fields. Keep supporting photographs or documents in the appropriate Case File rather than assuming selecting a due-diligence option attaches them automatically.

Review the purpose of the form

Use a general inquiry report when it fits the requested documentation. If the assignment requires a California declaration or a particular court form, choose that supported form and review the resulting requirements separately.

07 California POS-010

Choose California Forms > POS-010 Proof of Service of Summons, then Continue to Form. The editor title is POS-010. Review the completed pages and any required separate material before delivery.

SETTING / CONTROL	WHAT TO DO AND WHY
Attorney / party and court	Enter attorney or party-without-attorney details, court county and addresses, branch, parties, case number, and reference/file number. Supported Attorney selection can prefill fields; check every value.
Documents Served	Choose the actual documents from the provided options, including summons, complaint, ADR package, Civil Case Cover Sheet, cross-complaint, or specified other documents.
Party / address / method	Enter party served, entity recipient/authority if applicable, service address, and the appropriate method. Personal, substituted, mail/acknowledgment, and other-means sections expose different data fields.
Substituted / mailing details	Check actual delivery date/time, accepting person, relationship/description, location choice, mailing after delivery where relevant, and any diligence-attachment choice. Choosing an attachment checkbox is not proof a separately required narrative is present.
Notice to Person Served	Select the notice capacity and code-section option shown for the case. These choices are entered facts/options, not a recommendation about the legally appropriate method.
Person Who Served Papers	Use saved Process Server Information where enabled. Check name, address, telephone, fee, registration status, relationship, county, and registration number as applicable.
Declaration / Signature	Select certification, draw, choose optional signing metadata, and Confirm Signature. The validator requires a signature and confirmed date; with metadata enabled it also requires signing GPS.
Validate / generate / export	Use Validate Required Fields, Generate Completed POS-010, then Export Completed POS-010 for the completed output. Export Blank POS-010 is a separate blank-template action; do not confuse it with the filled form.

Review the completed form, including the signature area

Check every populated page, checked box, party/case reference, dates, and the actual signature. The source renders and flattens the final filled/signature output. Do not promise that editable PDF fields or a certificate-based digital signature remain in the completed copy.

Validation scope

The code checks key fields such as county, parties, case number, selected document, served party, address, server contact, signature/date, and selected GPS. It does not establish that every legal prerequisite or externally required attachment is complete. Recheck optional or method-specific facts yourself.

08 POS-020 and documents attachment

Choose POS-020 Proof of Personal Service, Civil for its main form and supported related attachments. Choose POS-020(D) Documents Served Attachment when you need the standalone document-list attachment.

SETTING / CONTROL	WHAT TO DO AND WHY
POS-020 main information	Complete attorney/party, court, case, documents, primary Person Served, Service Address, Date Served, Time Served, server information/status, and declaration choices.
Add Document	Adds another Document Served entry. The main form receives the first nonblank document; remaining nonblank entries feed POS-020(D) automatically. This differs from POS-030's overflow rule.
Add Another Person Served	Adds a person with their own name, address, service date, and time. The source prepares POS-020(P) automatically for additional people. Check each row rather than copying the first person's facts without review.
Signature / GPS	Draw and Confirm Signature. Optional Add date, time, and GPS coordinates activates a validator requirement for signing coordinates. Check actual GPS or turn the optional metadata setting off before regenerating if appropriate.
Validate / output	Validate Required Fields identifies incomplete fields. Generate Completed POS-020 opens the completed preview; Export Completed POS-020 prepares delivery. Inspect the complete main/attachment packet.
Standalone POS-020(D)	Enter Short Title, Case Number, and Document Served rows. Add Document and Remove manage the list. Preview POS-020(D) and Export POS-020(D) are separate actions.
13 lines per attachment page	The standalone editor describes 13 document-description lines per page, adding POS-020(D) pages when there are more than 13 documents. Review long names and actual pagination; a line capacity is not a universal character limit.

Keep the packet complete

A standalone POS-020(D) is a documents attachment, not a completed proof of service. When generated through POS-020, verify every expected document/person page is included, correct case identifiers repeat, and page counts are sensible. Do not assume tapping Preview preserves an exported file.

Validation details

Checks include case/court parties, documents, the person and address, additional-person rows, server/contact, applicable registration information, declaration/certification, signature/date, and selected GPS. These app checks do not verify personal service occurred or replace a final review.

09 California POS-030

Choose POS-030 Proof of Service by First-Class Mail, Civil. This editor records entered mailing facts and produces the main form with related attachments when needed.

1. Enter attorney/party, court, and case details.
2. Complete Mailing Information and actual Document Mailed rows.
3. Choose the appropriate Mailing Method option.
4. Enter the person served and mailing address; add other people where needed.
5. Complete Person Completing Proof, draw/confirm the signature, validate, preview, and export.

SETTING / CONTROL	WHAT TO DO AND WHY
Mailing Information	Residence or Business Address, Date Mailed, City and State Mailed From, and the document list. The app does not mail documents when these values are saved.
Documents attachment	The source uses POS-030(D) when there are more than four cleaned document entries or the joined main-form document text exceeds 150 characters. Check the actual output instead of treating four short documents as the only threshold.
Additional people	Add the other named recipients and addresses through the offered additional-person control. The source generates POS-030(P) when additional persons are present.
Person Completing Proof	Enter Printed Name or use Use Saved Process Server Name, then confirm it is the person who actually completed the described work.
Signature	Draw the signature, Clear Signature if replacing, and Confirm Signature. Date/time/GPS is optional, but selecting metadata requires signing GPS in the validator.
Actions	Validate Required Fields; Generate Completed POS-030; Export Completed POS-030. The preview includes a Share action. Reset POS-030 Form clears its current draft after the provided confirmation flow.

A practical multi-recipient mailing

List the actual papers and recipients. Keep each address correct, check when the packet gains documents/persons attachment pages, and verify that the mailing date/method matches your record. Adding people to this editor does not create route stops, deliveries, invoices, or postal tracking.

Review all pages before delivery

Check the main form, POS-030(D), and POS-030(P) where generated. Long names, addresses, and descriptions need visual inspection. Preserve the completed PDF explicitly; a restored draft and a previously shared copy are different records.

10 California Due Diligence

Choose California Forms > California Declaration of Due Diligence. The destination screen is titled California Due Diligence. It provides a service-attempt declaration separate from the general Due Diligence inquiry report.

SETTING / CONTROL	WHAT TO DO AND WHY
Case Information	County, Case Number, Reference / File Number, parties, person/entity attempted, Primary Service Address, and any authorized-agent/entity relationship.
Service Attempts	Add Another Attempt up to the supplied maximum of 8 rows. Each meaningful row must have Date, Time, Address / Location, and Result / Observations. Remove is available while more than one row exists.
Additional Diligence / Inquiries Made	Enter additional searches, inquiries, and observations. This is a narrative field, not an automated public-records investigation.
Person Making Attempts	Name, Business / Mailing Address, Telephone, California Registration Number, and Registration County. Check the actual values; shared setup is not a guarantee that every screen prefills the same fields.
Server Qualification and Status	Confirm the displayed age/nonparty statement only if true. Choose Server Status and Registered Server Relationship where shown.
Declaration and Signature	Complete Executed At (City / State), Printed Name, signature, and confirmed signature date. Optional signing metadata requires coordinates when enabled.
Validation and output	Validate Required Fields; Preview Completed Declaration; Generate and Export PDF. Reset California Due Diligence Form manages this working draft, not the other forms' setup records.

Complete each attempt factually

The code identifies meaningful rows from any entered attempt date, time, address, or result, then requires all four values for each such row. Filling one part of an otherwise blank optional row can therefore trigger missing-field errors. The output data takes the first eight attempts.

Eight rows is an app limit, not a legal standard

The maximum describes the supplied editor and output model. It does not determine how many attempts an assignment requires. Preserve any additional relevant records through an appropriate supporting-document or other accepted workflow rather than silently leaving them out of the record.

Read the final declaration

Verify identities, attempt sequence, exact locations/results, additional inquiries, signature, and any captured location. Validation confirms code-defined fields, not the adequacy of the overall diligence or the truth of the observations.

11 Write a General Statement

Choose General Statement, then Continue to Form. Complete the statement facts and narrative before preparing the PDF. The source also supports optional interview recording, described on page 12.

SETTING / CONTROL	WHAT TO DO AND WHY
Form Information	Form title; Case or file number; client name/company; Statement date and time; Statement location. These are entered values and can differ from incident or audio-recording time.
Assignment	Assign Form To offers Unassigned, Client Profile, or Case File. Supported selections prefill client/case context. A case selection first uses the case name, then its profile can supply a case-number default. Recheck the final reference.
Person Providing Statement	Full legal name, Street address, Telephone number, Email address, Identification or relationship to incident, Statement taken by, and Interviewer title.
Incident Information	Use a separate incident date and time exposes separate incident time. Enter Incident location. Do not substitute interview time/location for the event without review.
Statement	Enter the narrative. Recording audio does not transcribe it into this field. Use factual wording and check the speaker, observations, dates, and any quoted text.
Signatures	Separate drawing areas for the person providing and the person taking the statement. Clear Provider Signature and Clear Interviewer Signature clear the respective strokes. This screen is not the scanner's Place Signature editor.
Certification / notary	Include statement certification starts enabled in fresh state. Include optional notary block starts off and adds a blank block for later completion. It does not perform a notarization.
Preview / export	Preview PDF, then Export, Share, or Print PDF; the export label changes when audio is attached. The generation check requires provider name, a nonblank narrative, and recording stopped. Check signatures yourself; those are not enforced by the same guard.

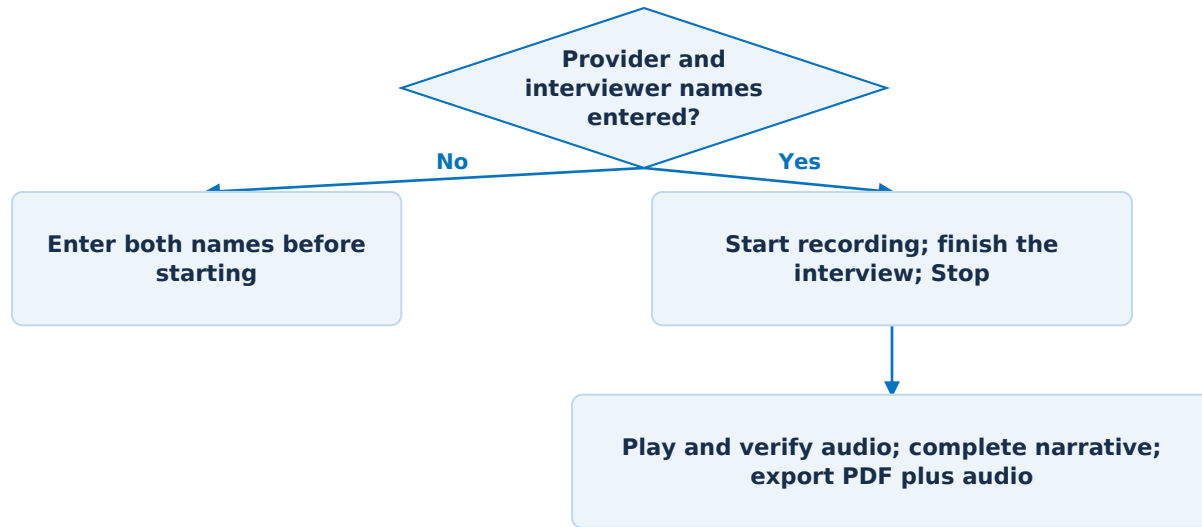
Assignment is not automatic document filing

The supplied General Statement selection functions prefill context. The export path creates a temporary PDF and optional audio share items; it does not automatically save that PDF into the selected Case File or Evidence Locker. Save the output deliberately and attach/link it through the supported workflow.

Reuse professional information carefully

The interviewer defaults can use Professional Profile's saved name/title when those fields are blank. A restored draft can retain prior values. Before a new statement, check the provider, interviewer, case, and incident details instead of assuming defaults replaced them.

12 Record a statement interview



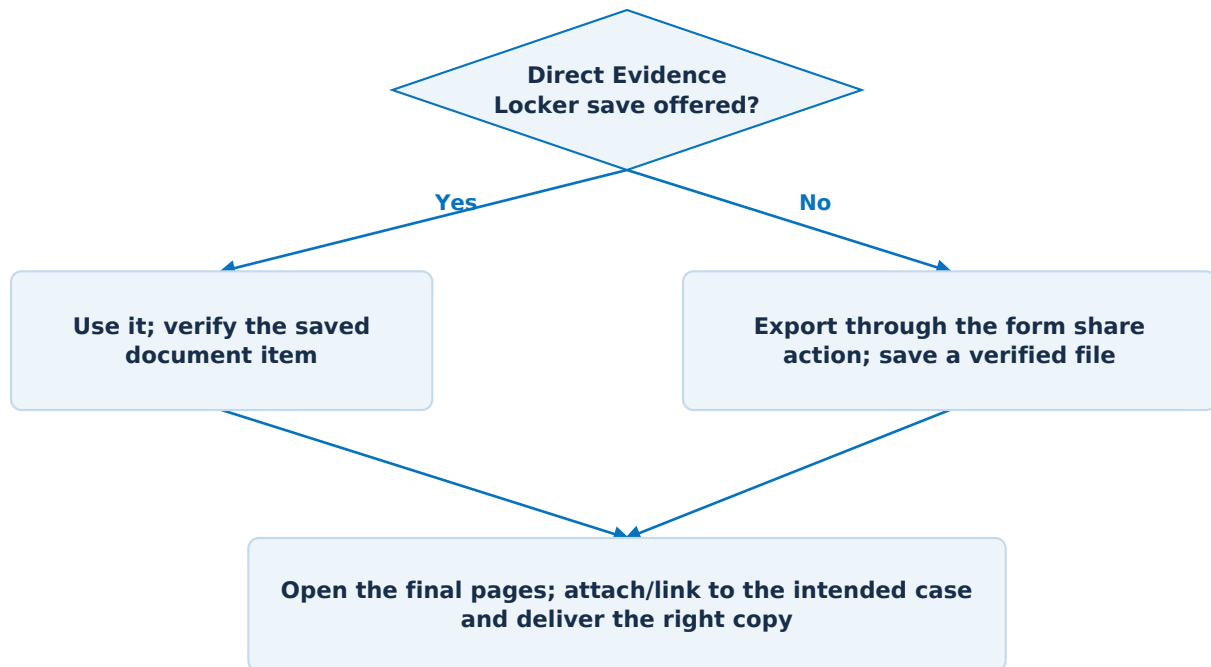
1. Enter both names. Review the recording/consent notice and resolve required authorization first.
2. Choose Start Interview Recording, allow microphone access, and check Recording status and elapsed time.
3. Choose Stop Interview Recording. Review start/end, duration, available location/GPS, and the audio filename.
4. Use Play Interview Recording and verify the actual sound.
5. Finish the written narrative and select Export PDF and Interview Audio.

SETTING / CONTROL	WHAT TO DO AND WHY
One recording per current statement	Start rejects an already attached recording. Delete Interview Recording has a confirmation before removing that recording; preserve any required copy first.
What the PDF contains	A disclosure added before the narrative identifies available interview date, participants, start/end, duration, location/GPS, and associated audio filename. It is not an automatic transcript.
What sharing contains	The source passes the PDF and resolved .m4a audio URL as separate share items. Verify both reached the chosen destination. The audio is not embedded as a playable stream inside the PDF.
Reset Form	The statement reset function cancels an active recording and deletes the associated stored interview audio. Preserve required files before confirming reset. Close explicitly stops an active recording and saves the working draft.

Test the actual device and destination

Verify microphone/location permissions, audio playback, and both saved files. Available device location is not verified incident location. Full audio sync and background recording are not established here.

13 Preserve the completed output



Choose the action the selected form actually offers

General returns and general Due Diligence have direct Save to Evidence Locker actions in the supplied editors. California forms and General Statement have their own preview/export/share actions; do not invent a common Save button on every form. Use the supported output path, then add the resulting file where needed.

Check more than the first preview page

Review the entire final PDF for correct matter, people, form, dates, addresses, methods, narratives, signatures, optional metadata, attachments, page order, and legible wrapping. Open the saved copy after exporting. Selecting Preview, Share, or an assignment dropdown alone is not proof that a durable final record exists.

Deliver using available Apple actions

Use the available system share actions to save, email, AirDrop, or print where supported. General returns additionally expose Print PDF on Mac. The Mac forms use shared form-specific output paths, so do not assume every form automatically saves to the Desktop Export Folder setting used by other desktop evidence exports.

Keep PDF, audio, and case evidence together deliberately

For a recorded statement, retain both the statement PDF and the associated audio. For a service form, preserve required supporting photographs, attempts, documents, and the completed return. Attaching a document is separate from entering a billing charge or marking a route stop complete.

14 Platform differences and final checks

SETTING / CONTROL	WHAT TO DO AND WHY
iPhone / iPad	Mobile Form Generator entry is Pro-gated. Form selection opens shared editors. Use the actual available date controls, signature pads, preview, and Apple share actions on the installed device.
Mac Catalyst	Command Center uses FormGeneratorView directly. General return signature help supports mouse/trackpad; the return has a separate Print PDF action. Do not assume every editor has the mobile access gate or identical preview/share behavior.
Working drafts	FormDraftStore has draft keys by form type, not a verified unlimited list of separately named completed forms. Several editors autosave/restore; standalone POS-020(D) has state fields with no equivalent draft store in its supplied editor.
Reset and Close	Use the selected form's actual confirmation and reset behavior. Reset can clear draft/signature/assignment data and, in General Statement, delete interview audio. Close can save working draft state; it is not a universal discard or final-export action.
Sync and Family Sharing	Eligible data may use the same-account iCloud path. The missing model and release tests prevent a complete form/audio sync guarantee. Family Sharing does not merge different accounts' cases or form records.
No universal character/page cap	Do not reuse media-note or Case Summary limits for form narratives. The supplied form editors/exporters have their own validation and layout behavior. Verify long text, additional persons/documents, and actual pages instead of promising unlimited fit.

Checks still needed before publication

Confirm the matching Xcode target/build configuration, Core Data model, microphone/location descriptions, bundled form templates, and release entitlement enforcement on Mac. Test each catalog destination, setup save, draft/reset behavior, signatures with and without GPS, attachment pagination, long text, audio playback, and export on iPhone, iPad, and Mac. PDF templates must be included in the actual app target; their presence in this ZIP alone does not prove target membership.

Source review: FormGeneratorView; ProcessServerInformationSetupView; AffidavitLanguageSetupView; CaliforniaServiceSettingsView; GeneralAffidavitFormView; DueDiligenceFormView; GeneralStatementFormView; GeneralStatementAudioRecorder; California POS-010/020/020(D)/030 and Due Diligence views/exporters; FormDraftStore; EvidenceLockerDocumentStore; mobile/desktop entry paths. Android Form Generator PDF used for presentation reference.

Request another form or a personal walkthrough

Email support@finalexhibit.com or message **Final Exhibit on Facebook**. For a form suggestion, include its title, blank original, jurisdiction when relevant, and the field workflow it should support. For help, identify the device, form, and step needing a walkthrough. Suggestions for other practical workflows are welcome.