



Advanced Documents Template Assembly – Word Addin



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Contents

Introduction.....3

FilePro Word Addin4

Before you Start.....6

MultiMerge.....8

Regions – Insert Company Logo13

Regions – Signature Picker17

Regions - Using a date range21

Introduction

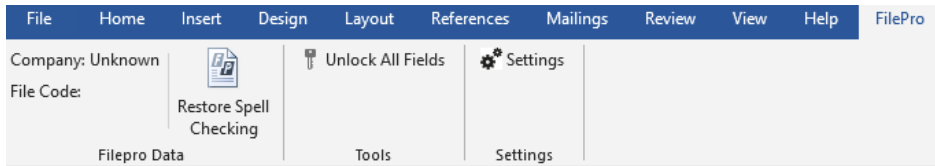
This course is designed to provide users with the knowledge needed to utilise the FilePro Addin and the creation and maintenance of "smart" document templates in Filepro.

On completion of this course you will be able to:

1. Use features in the FilePro Word Addin:
 - a. Create a MultiMerge letter
 - b. Understand and create Regions by:
 - i. Creating a Letterhead Region
 - ii. Creating a Signature Picker
 - iii. Creating a Seasonal Message
2. Understand why "smart" templates are better for your business
3. Use Word features such as:
 - a. Advanced Settings
 - b. Switches
 - c. IF Statements
 - d. Ask Statements
4. Attach document templates to profiles

FilePro Word Addin

Since V18.3, FilePro has opened up more features into Word using an Addin. If the Addin has been installed, it will appear on the Word Menu Bar. If you do not have this installed, please contact FilePro Support.



You can set up your templates using the Word Addin for:

- **MultiMerging**

The ability to conduct a single merge to multiple contacts, and creating a separate document for each contact. For example, the same letter to all Beneficiaries, Doctors or Witnesses

- **Regions**

Storing your letterhead details in one place making it easier to maintain your precedents, particularly when there is an update in say, your address, phone number etc. This feature can also be used as a signature picker or your yearly Christmas message.

- **Word Invoices**

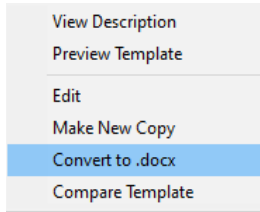
A way in which to generate firm invoices into Word rather than the reports. This feature requires FilePro Support setup and is not covered in this session. Please contact FilePro Support for more information.

- **Preserve Macros, Bookmarks and TOCs**

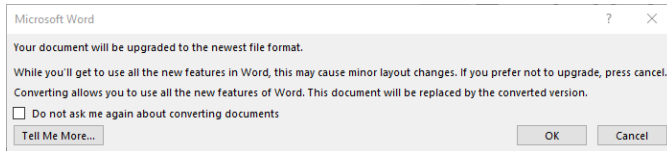
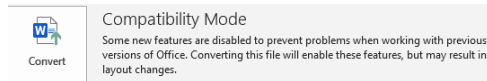
Advanced Word features such as macros, Table of Contents and cross-referencing will be preserved

PLEASE NOTE: All templates using the FilePro Word Addin need to be saved into FilePro in the .docx format. If you have an existing template that you need to convert, open the **Document Template**

Manager and locate the template, **right click** on it and select "**convert to .docx**".



Open the template in MS Word and click on **File/Info/Compatibility Mode (Convert)/OK**



Close and save your template as you would normally.

Notes

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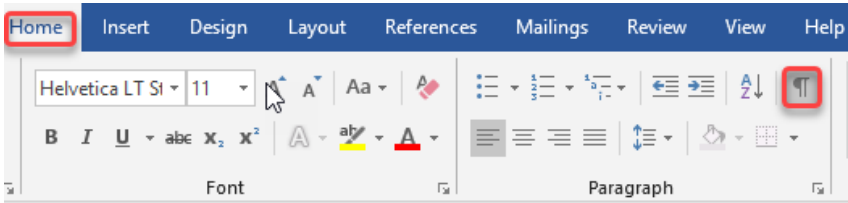
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Before you Start

When working in templates, there are a few Word Settings that are useful to have turned on:

1. On the Home Menu, show your **non printing symbols**.



This will ensure that you can see all spaces, tabs and paragraph markers.

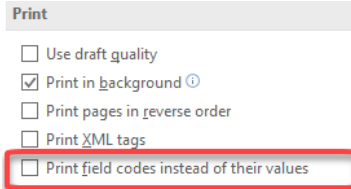
2. To turn on **Field Shading** click on **File/Options/Advanced** – scroll down to **Show Document Content** and select, either **Always** or **When Selected**.



3. Remember your **ALT+F9** key to **reveal your code**.
4. And, when entering in script (or code) from scratch, you will need to use the **CTRL+F9** key to insert a **blank set of field codes**.

Helpful Hint

If you like to keep a printed record of all your templates with the field codes displayed, this can be done by clicking on **File/Options/Advanced**. Scroll down to the **Print Options** and check on the box **Print Field Codes instead of their values**.



Print

- ☐ Use draft quality
- ☒ Print in background ⓘ
- ☐ Print pages in reverse order
- ☐ Print XML tags
- ☐ Print field codes instead of their values

IMPORTANT: Please ensure that this feature is turned on **ONLY** when printing the template. It must be turned off at all other times.

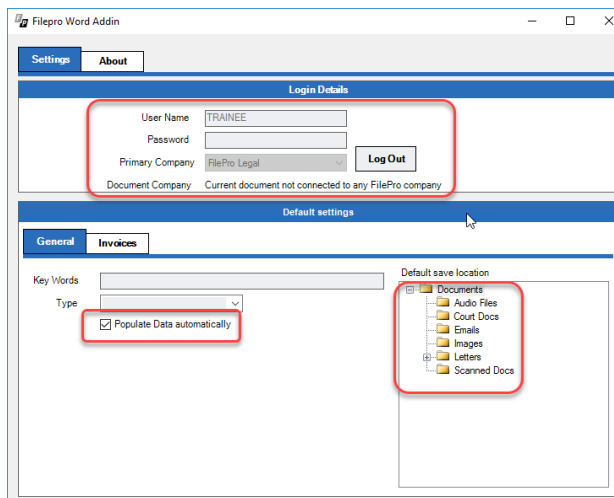
MultiMerge

The MultiMerge feature can cut down the amount of time producing the same correspondence to the same contact type. For example, you might need to advise all Doctors on a file that there is a court hearing coming up and they will need to attend with all their necessary documentation and reports. Some matters might have only two or three Doctors attached to the file, others, 20 or more.

Using the MultiMerge will mean that the user will have to merge the template only the once. Each letter will be created and saved back to the matter.

There are a few settings that users will need to have turned on in Word to make this process simple. **See the settings below.**

1. Ensure the user is logged in
2. The Addin will, by default, be set to "Populate Data automatically". If this is not selected, the template will stop part way and the user will need to select the "Populate Data" button from the FilePro ribbon.
3. The Default folder can be selected so that merged documents will automatically be saved into the correct location in FilePro.



Method - Creating a Multi Party Merge template

1. Open the template
2. On the Edit Template screen, click on the FilePro Word Addin option and the MultiMerge check box.

Edit Template

Template Information

Template Name: Letter to Doctor advising attendance at Court

Template Type: Letter ☐ General Template

Matter Type: [P]

☒ Merge Template

Merge Technology: ☐ Microsoft Word ☒ FilePro Word Addin ☒ Multi-Merge

Description: [Empty]

Buttons: Save, Edit, Cancel

3. Click on Save and then re-open the Template
4. Ensure the correct mergefields are attached to the document.

Generate/Link Merge Set (Document Template Fields)

Currently Working On Document Template Fields (Letter to Doctor advising attendance at Court)

Buttons: Use Fields, Close

Table: Files, Field: ADDRESS

Merge Field Name: Files_ADDRESS

+ Add Field

Name	Table	Type	No	Field	A/O
Contacts_Client_SURNAME	Contacts	Client		SURNAME	AND
Contacts_Client_TITLE	Contacts	Client		TITLE	AND
Contacts_Doctor_MAILING_ADDRESS_1	Contacts	Doctor		MAILING_ADDRESS_1	AND
Contacts_Doctor_MAILING_ADDRESS_2	Contacts	Doctor		MAILING_ADDRESS_2	AND
Contacts_Doctor_MAILING_ADDRESS_3	Contacts	Doctor		MAILING_ADDRESS_3	AND
Contacts_Doctor_MAILING_ADDRESS_4	Contacts	Doctor		MAILING_ADDRESS_4	AND
Contacts_Doctor_MAILING_NAME	Contacts	Doctor		MAILING_NAME	AND
Contacts_Doctor_NAME	Contacts	Doctor		NAME	AND
Contacts_Doctor_REFERENCE	Contacts	Doctor		REFERENCE	AND
Contacts_Doctor_SURNAME	Contacts	Doctor		SURNAME	AND
Contacts_Doctor_TITLE	Contacts	Doctor		TITLE	AND
Files_FILE_CODE	Files			FILE_CODE	AND
Files_FILE_MANAGER	Files			FILE_MANAGER	AND
Files_FILE_NAME	Files			FILE_NAME	AND
Files_FILE_OWNER	Files			FILE_OWNER	AND
Files_MATTER	Files			MATTER	AND

Buttons: Delete Field, Save As, Save, Finish

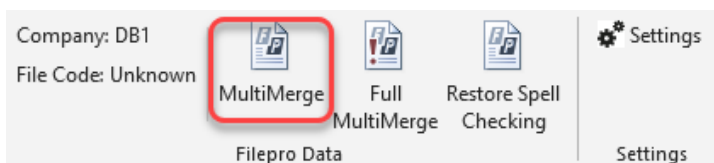
- Set up your letter/document as you would normally by inserting all mergefields required.

¶
 ¶**MERGEFIELD-Contacts_Doctor_MAILING_NAME**¶
 ¶**MERGEFIELD-Contacts_Doctor_MAILING_ADDRESS_1**¶
 ¶**MERGEFIELD-Contacts_Doctor_MAILING_ADDRESS_2**¶
 ¶**MERGEFIELD-Contacts_Doctor_MAILING_ADDRESS_3**¶
 ¶**MERGEFIELD-Contacts_Doctor_MAILING_ADDRESS_4**¶
 ¶
 ¶
 ¶Dear **MERGEFIELD-Contacts_Doctor_TITLE** **MERGEFIELD-Contacts_Doctor_SURNAME**¶
 ¶
 ¶**RE: **MERGEFIELD-Files_MATTER** **Upper****¶
 ¶
 ¶We refer to the above matter and advise that this matter will be heard in Court on **FILLIN**
 ¶**"Date of hearing"**¶
 ¶
 ¶As a part of these proceedings you are requested to attend the court together with all
 ¶supporting reports.¶
 ¶

- Save and close as normal ensuring the template has been checked in.
- To test, open a matter and ensure that there are multiple contacts of the type required attached to the matter.

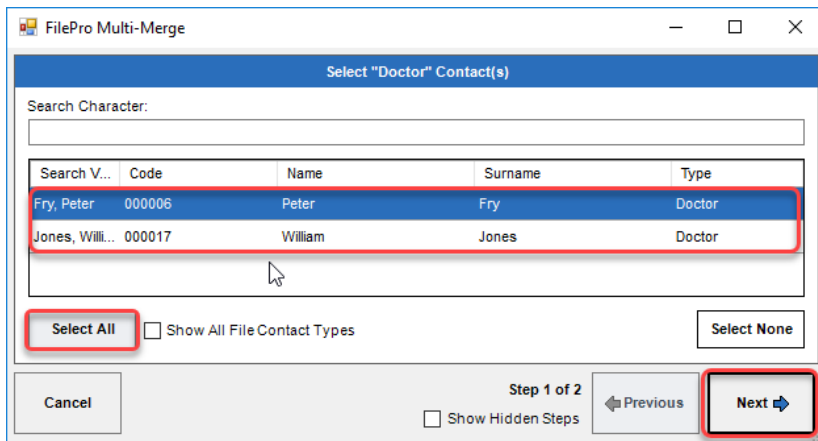
Type	Code	Contact
Barrister	000008	Mr Kent Roth-Warren
Client	000004	Mr Joe Bloggs
Doctor	000006	Dr Peter Fry
▶ Doctor	000017	Mr William Jones
Manager	000001	Mr David Keeler

- Generate your document as you would normally.
- The template will stop when opened in Word.
- Select MultiMerge on the FilePro ribbon.



11. On the Select Screen, you can either click on the "Select All" button, or, using your control+left click, you can select individual contacts.

Click on the Next button.



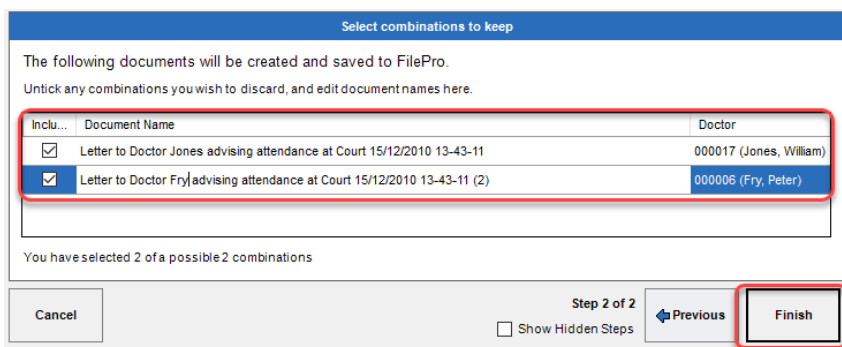
The screenshot shows the 'FilePro Multi-Merge' window with the title 'Select "Doctor" Contact(s)'. It features a search bar, a table with columns 'Search V...', 'Code', 'Name', 'Surname', and 'Type', and buttons for 'Select All', 'Select None', 'Cancel', 'Previous', and 'Next'. The 'Next' button is highlighted with a red box.

Search V...	Code	Name	Surname	Type
Fry, Peter	000006	Peter	Fry	Doctor
Jones, Willi...	000017	William	Jones	Doctor

Buttons: Select All, Show All File Contact Types, Select None, Cancel, Step 1 of 2, Show Hidden Steps, Previous, Next.

12. The following screen will display the name of each of the merged documents. You can click into each of the name fields and re-name if necessary.

Click on the Finish button.



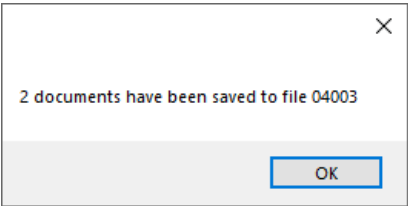
The screenshot shows the 'Select combinations to keep' screen. It displays a list of document combinations with checkboxes for selection. The 'Finish' button is highlighted with a red box.

Inclu...	Document Name	Doctor
<input checked="" type="checkbox"/>	Letter to Doctor Jones advising attendance at Court 15/12/2010 13-43-11	000017 (Jones, William)
<input checked="" type="checkbox"/>	Letter to Doctor Fry advising attendance at Court 15/12/2010 13-43-11 (2)	000006 (Fry, Peter)

Buttons: Cancel, Step 2 of 2, Show Hidden Steps, Previous, Finish.

13. Any Fillin or Ask scripts will now run, in this instance, the Hearing Date.

14. When completed, you will be notified that the documents have been saved back to the matter in FilePro. If necessary, you can use your right click and preview the letters.



▲ Ima...	Created	Name	Type	Ext
	15/12/2010	Letter to Doctor Fry advising attendance at Court 15/12/2010 13-43-11 (2)	Letter	docx
	15/12/2010	Letter to Doctor Jones advising attendance at Court 15/12/2010 13-43-11	Letter	docx

15. Once merged and saved you can preview the merged documents by right clicking on them and selecting Preview

EXERCISE

- **Convert** template "**Letter to Doctor advising Attendance at Court**" to **.docx** format
- **Change** the merge technology to use the **FilePro Addin** and the **MultiMerge**
- Set up your template ensuring all necessary field codes for the doctor are attached
- **Open file 04001** and **add Dr William Jones** to the **Contacts tab**
- Test

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Regions – Insert Company Logo

In the past, Firms were required to store all letterhead and other repetitive information on each of their templates – this could mean a tedious job when rebranding a business. Regions will help to eliminate this task by storing information in a "shell" which is then applied to any relevant templates. The Region is inserted into the document or letter template and, rather than updating changes directly in the template, changes can be made to the Region which is then automatically fed out into the templates when merged.



Further, fields can be used to insert specific graphics or text. For example, the scanned signature of the owner of a file can be automatically inserted into a document once merged. Date fields can be used to only display a Seasonal Message between certain dates.

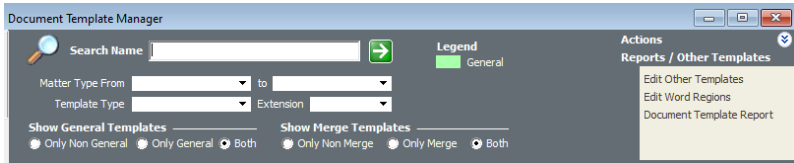
Helpful Hint

We suggest that you consider all possible requirements in your documents so that you need only make one more pass over your templates.

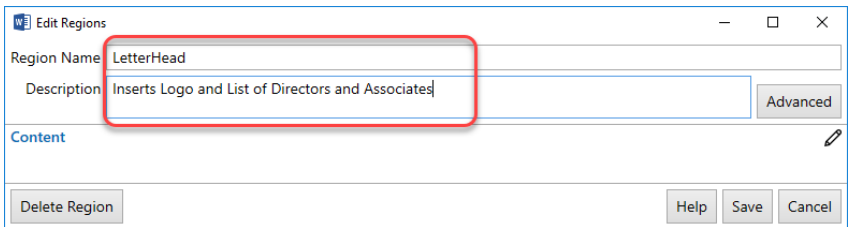
PLEASE NOTE: Regions cannot be applied to the Contact Letter.

Method - Set up a Letter Head Logo Region


1. Open the Document Template Manager
2. Click on the **Reports / Other Templates** on the top right hand side of the Manager screen and select Edit Word Regions



3. Click on "Create New Region". The below screen will be displayed.



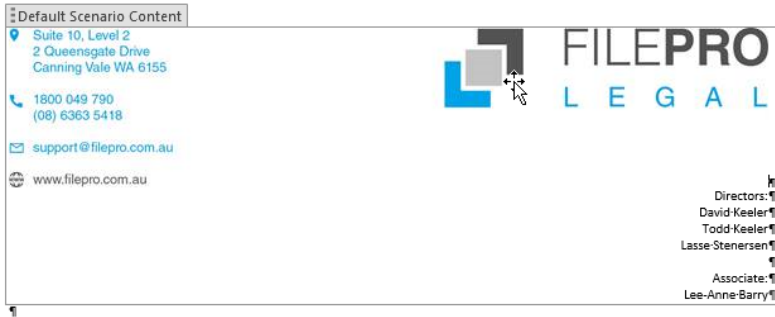
Insert the name of the Region and any necessary descriptions as to what the region inserts once the document has been merged.

4. Click on the Edit button 
5. Click into the Default Scenario Content window and remove the words *"Enter Content here."*



6. Insert any text and/or images into the Scenario ensuring that as much of the formatting as possible be done within the region – eg: alignment, fonts and spacing.

IMPORTANT: Keep all items within the borders of the Scenario. If anything falls outside of the boundaries, it will not be included in the region and will not appear on your merged document.



7. Close Word using the X on the top right hand side.

A preview of the region will now be displayed in the region Content panel. Click on the Save button, and close the Regions Window.

8. Open your template and click on the **FilePro Menu** and select the **Insert Region** button  on the ribbon.

9. Select the **region** from the **Available Regions** on the left and click on the **Insert button**. Map any fields that may be included in the region

10. Close and save the template and test.

EXERCISE:

- Create a **Letterhead Region** using the FilePro Legal Logo and insert a list of Directors and Associates under the logo on the right hand margin
 - Directors: David Keeler, Todd Keeler and Lasse Stenersen
 - Associate: Lee-Anne Barry
- Save the Region
- Open template **Blank Letter to Client** and select **FilePro Word Addin**. Remove the old letterhead image from the header and insert the Letterhead Region
- Test
- Open the Letterhead region and insert yourself as an associate.
- Test

This image shows a full page of white paper with horizontal dashed lines, typical of primary-ruled notebook paper. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Regions – Signature Picker

To assist with your paper-lite, or paperless office, you can use Regions to insert scanned signature images. This is done by collecting your signatures into a network or local folder and then, using the Owner field (you may also use a UDF if you prefer), inserting each of the signature images into a Region.

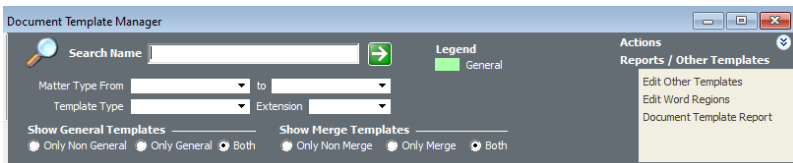
When setting up the Region, you need to consider the logic behind the selection. A Region will always look at the first option given and if the conditions are all true, will insert the result. If not true, it will step through each of the options, until it finds a true response. When setting up the Region it is best practice to always provide a "default" or, way out.

Signature Region

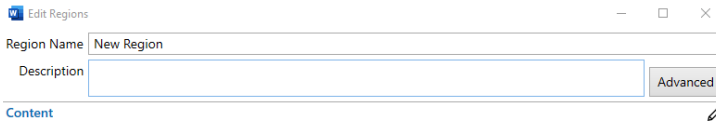
If Signature is equal to XXX then insert XXX
 But, if Signature is equal to YYY then insert YYY
 But, if Signature is equal to ZZZ then insert ZZZ
 Otherwise, always revert to the Default

METHOD - Set up a Signature Region

1. Open the Document Template Manager
2. Click on the Reports / Other Templates on the top right hand side of the Manager screen and select Edit Word Regions



- Click on "Create New Region". The below screen will be displayed.

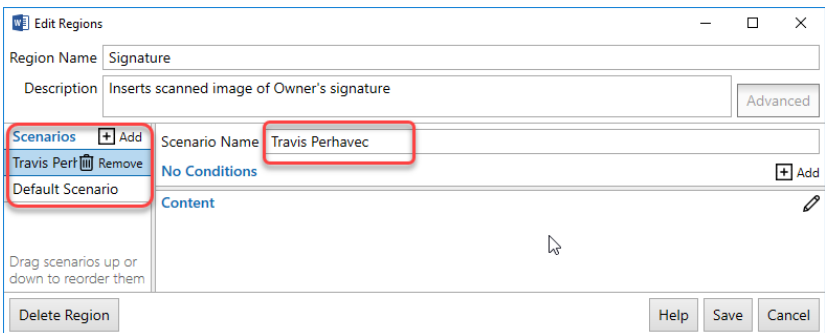


Insert the name of the Region and any necessary descriptions or instructions of what the region inserts once the document has been merged.

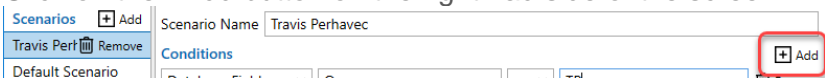
- Click on the Advanced button

This will display the "Scenarios" side bar.

Click on the +Add button to add a Scenario and give the Scenario a name.



- Click on the +Add button on the right hand side of the screen.



- In the Conditions, select Database Field. Enter in your description, in this case Owner, and the initials of the Owner.

In this instance, leave the = sign. This way, the scenario will read: *go to the Database field called Owner and if it is equal to PK, then do something.*

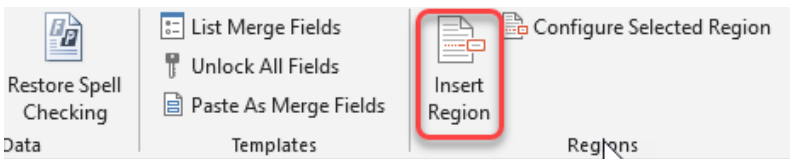
Click on the Pencil button to edit the Scenario.

Database Field: Owner = TP Remove

Content

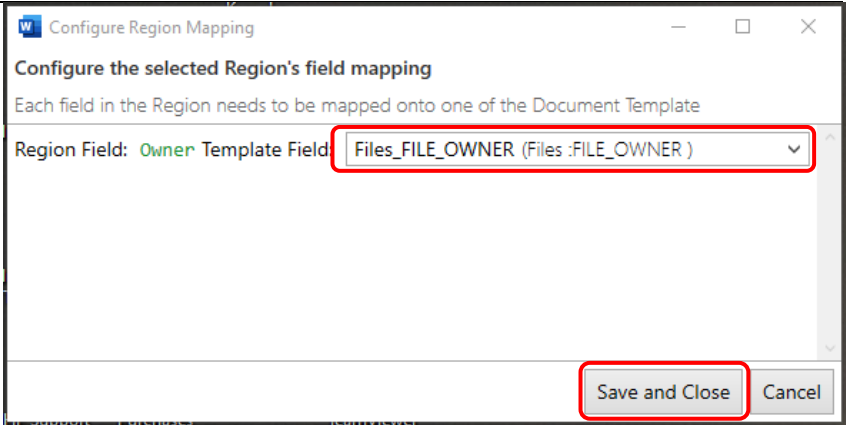
Help Save Cancel

7. Insert the image of the relevant signature into the Scenario Content box. You can remove any extra text and paragraph markers. You can also crop and adjust the size of the image so that it appears correctly on the merged letter.
8. Continue adding in other signatures and, ensure that there is a "Default" scenario as the last item on the list which does nothing.
9. Open the Default scenario and remove the "Enter Content Here" so that it is blank.
10. Close and Save your scenario and Region Manager.
11. Open your template.
12. Check that the field "**Files_FILE_OWNER**" (or relevant field) is part of your data set, if not, add it.
13. Position your cursor between the "**Yours faithfully**" and the Signature line
14. Click on the FilePro Menu option and click on "**Insert Region**" on the ribbon.



Select the Signature Region and click on Insert.

Select the "**Files_FILE_OWNER**" field from the list and then "Save and Close"



Remove the text from the Region in the document.

Close and save and test your document, remembering to test each File Owner that is part of your Region, and the default.

EXERCISE:

- Create a **Signature Region** using the sample signatures for User Codes:
 - TP – Travis Perhavec
 - JAF – Jennifer Ferguson
- Insert the Signature Region into the template **Blank Letter to Client**
- Test by changing the owner details on the matter

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Regions - Using a date range

During a calendar year, there may be occasions when you will be required to insert temporary messages to your letters or documents. A prime example of this would be a seasonal message. This message is only required for short periods of the year, and using Regions, firms only need to update the message once a year – and only in one place.

As stated earlier, when planning the Regions required for your templates, it's a good idea to consider all possible requirements before adding your Regions to your templates.

The logic behind this Region is:

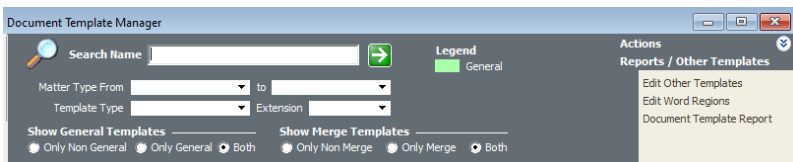
If the date is equal to or greater than, say 1 December,
then insert some text

However, if the date is equal to or greater than 3 January,
do not insert any text,

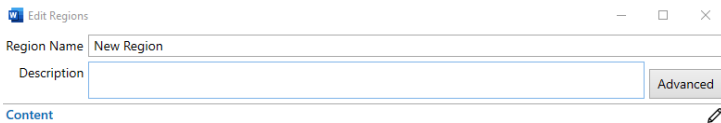
and then move to the default or the next scenario in the region

METHOD - Set up a Seasonal Message

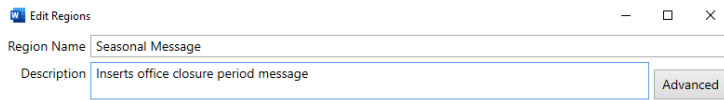
1. Open the Document Template Manager
2. Click on the **Reports / Other Templates** on the top right hand side of the Manager screen and select Edit Word Regions



- Click on "Create New Region". The below screen will be displayed.



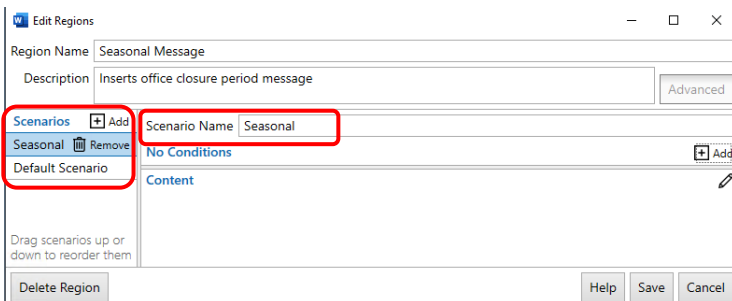
Insert the name of the Region and any necessary descriptions or instructions of what the region inserts once the document has been merged.



- Click on the Advanced button

This will display the "Scenarios" side bar.

Click on the +Add button to add a Scenario and drag it into the first position on the side bar. Give the Scenario a name.



- Add the Conditions by clicking on the +Add button on the right hand side of the screen.
- Select the **condition Current Date / greater than or equal to / and the date** that the message should start appearing.

7. Ensuring that you are still on the Seasonal Scenario, add another condition, **Current Date / less than or equal to / and the date** that the message should no longer appear

You should now see two conditions for the one scenario.

8. Click on the pencil to add the text that is going to appear in the senario. Remember that all text and images must be inserted within the Scenario Content Box.

9. Close and save the scenario.
10. Ensure that the Default Scenario is placed after the Seasonal. Open and edit the Default Scenario and remove any text that appears as a default. If this text is not removed, the words "Enter content here" will appear in your letter outside of the dates provided by the first scenario.

- 11. Open the template that you wish to insert the Seasonal message into. Ensure that your template is set to use the FilePro Word Addin.
- 12. Display the FilePro menu, position your cursor where you want the Seasonal message to appear in the letter. Click on Insert Region on the FilePro Ribbon and select the Seasonal Region. Click Insert and then Save and Close as normal.
- 13. **To test your template, you will need to change your system date and** then running the template. Remember to test dates before, during and after to ensure that your message is going to populate within the required period only.

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