actionstep

Document Templates FAQ'S

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How to Generate Merge Fields to Uppercase? Or Any Formatting?

You can still use any merge field options like |fm (format of dates, phone numbers etc), |case (lower case / upper case), prefix, suffix, bold, italics, etc – when you use the add-in to insert the merge field you can then toggle the merge field by pressing Shift F9 (PC) or fn-option-F9 on a Mac to get to the merge field code and then add in any formatting options. To see a full list of merge field options – click here.

When you insert a merge field it looks like this:

«Matter name»

When you click on the whole merge field and press Shift F9 (or Mac equivalent) it will look like this:

{MERGEFIELD Action_Name * MERGEFORMAT}

You enter your formatting options here:

{MERGEFIELD Action_Name|case=upper * MERGEFORMAT}

The above example will make the Action or Matter Name be in upper case.

Note: You can also type ACTION_NAME and it will all be in capitals.

Will the Template Be Linked to The Matter or The Matter Type? Or Available Across All Matters?

When creating a template, the matter type you have selected is where the document template will be published to – the template is not linked to the matter you are using as a preview. You only select a matter (and this is optional) so that you can preview what information would be put into the document by that merge field (to make sure you have the correct merge field).

However when publishing your template you have to pick a matter type to publish it to (this means the document template will be saved to this workflow/matter type).

← **Publish template**   ℹ

Any changes made to the template after publishing won't be saved. Remember to publish a new version of the template.

Template Name*

[   ] .docx

Matter type*

[General Matter   ⌄]

Description

[   ]

[**Publish**] [Cancel]

To find it you would go to Admin – Matter Types – Select the Matter Type and then go to Document Templates. Unfortunately you cannot save the template into a folder of that matter type to do this you have to go through Actionstep and move it to a folder.

To generate the document from Actionstep – if you do not save the template into a folder then the only way to generate the template is to go into the matter and then select the generate green button.
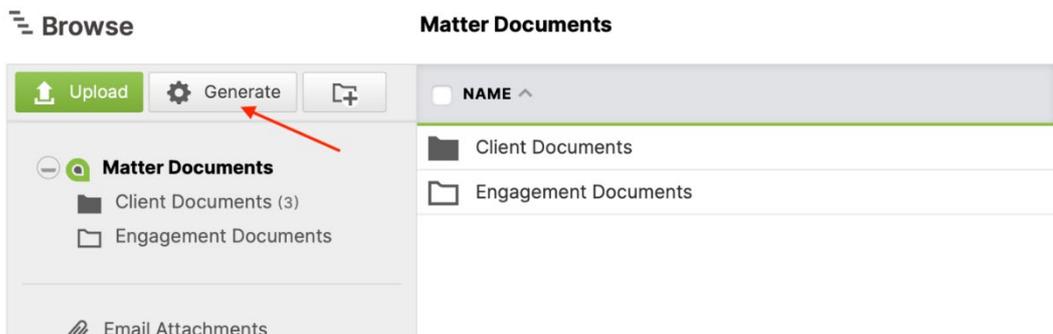
This gives you a list of all templates in your system – the ones in the current matter type will be first, and then every other matter types templates will appear after this.

So, you can access all document templates from any matter type.

Separate Templates for Client Vs. Company/Trust?

You do not need separate templates addressed to client's or Companies/Trusts – you can use the merge field FullName which will just show th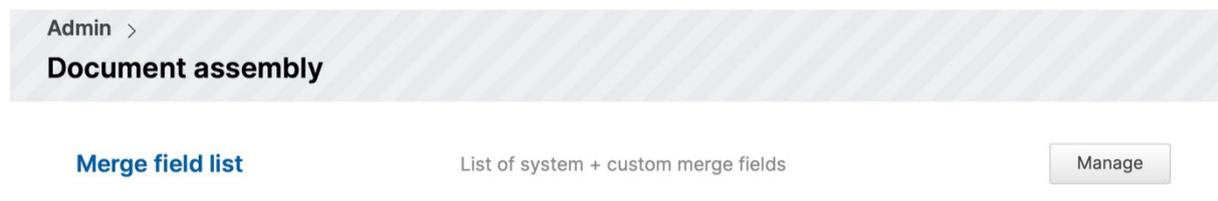e name as the way it is displayed or FirstNameLastName – which will show a Client's First and Last Name or the Name of a Company/Trust. There is also FirstNameLastNameList – which will provide the same but a list if there is more than one. You can find these in your merge field list (Admin – Document Assembly – Merge Field List) – there are other options as well.

Can We Use the Add-On with Existing Templates?

Yes, you can download an existing template into the word add-in from within Word. Go to the top left-hand corner and lick on the paper with the down arrow. Then select Download.
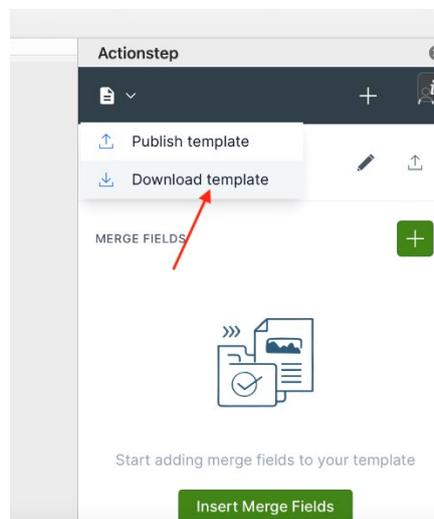
You then select the matter type you want to download the template from, and you will get a list of templates to download.

Please note that this downloads the word version to your downloads folder you then have to open the template in word with t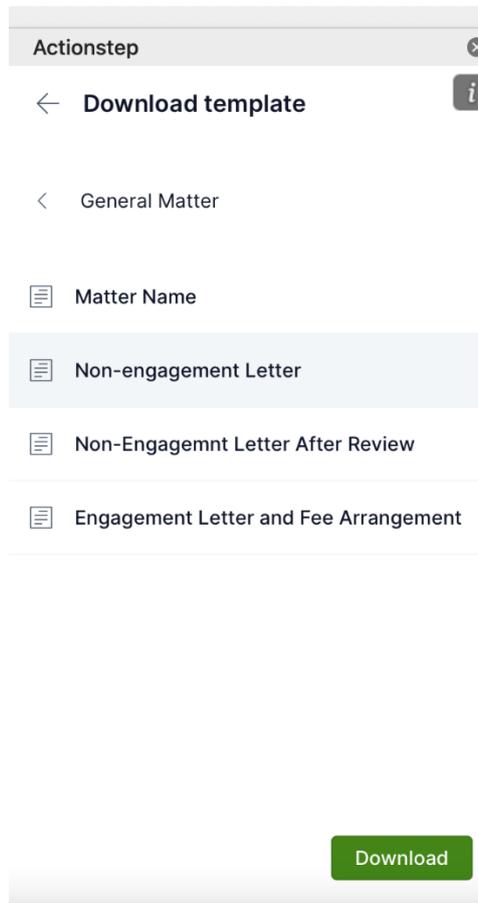he word add-in to begin working on it and when you publish this template it will save to Actionstep as a new template – it will not update the old template. So, you will need to manually delete the old template if it is no longer relevant.

Does It Work on A Mac?

Yes, same instructions and it does work on a Mac.

Does This Mean Non-Admin Profiles Can Publish Templates?

If the person does not have permission to save the template to a matter type in Actionstep then they will not be able to do it through the add-in either. However, they can still do all the work apart from publishing so they can save it locally and have it reviewed by an admin to be published.

Do You Provide A List of Merge Fields for Easy Reference Somewhere?

The word add-in also shows a list of the most common merge fields. However a full list can be found here: (Admin – Document Assembly – Merge Field List)

Admin >
Document assembly

Merge field list   List of system + custom merge fields   Manage
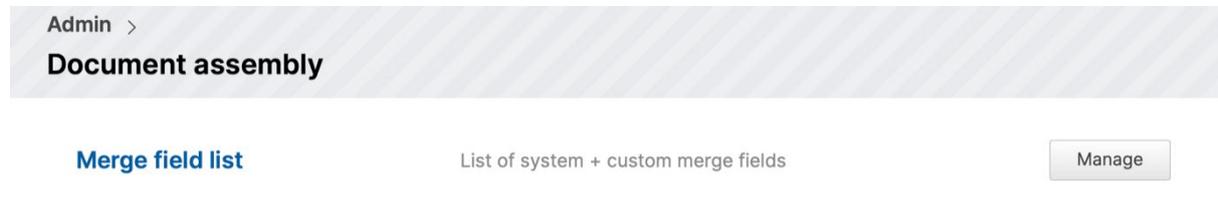
Please note: the merge field list will be different in everyone's system as every time you create a custom data field this also becomes a merge field, so it is constantly changing.

Is the Add-On Available Now?

Yes, it is – to install follow the instructions found [here](#).

Can You Preview A Document Prior To It Being Published?

No, unfortunately you cannot preview a document in its entirety before publishing.

Will You Look at Adding in Excel Template Docs as Well?

No, however you can have table within a word document that will work with merge fields.

How Do I Find Out More About the Advanced Functions (Especially If / Then)?

To find out more about advanced functions with document templating please see the following user guide articles:

[Merge Field Options](#)
[Conditional Merge Fields](#)
[Repeating Blocks of Text](#)
[Calculated Merge Fields](#)

However, I Would Very Much Love to See Participant Custom Data and Calculated Merge Fields Included.

No, unfortunately at the moment you cannot insert participant custom data or format options or calculated merge fields however you can still input these manually just like you used to. So, these will still work you just have to create the merge field and input them yourself and you will not be able to preview them to make sure they are correct.

## What Actionstep Subscription Level Do We Need to Use This?

The word add-in will work with any subscription except Express as Express does not allow for document templating.

Are the Merge Field Names Those from Within Actionstep Or Do We Need to Build, and Assume We Can Create Custom Fields Too?

Yes, the merge field names are the same ones in the word add-in to your Actionstep system and the word add-in allows you to insert the merge fields automatically instead of having to type them out yourself. Yes, you can create matter custom data fields and these will be available as merge fields in the add-in. Note: Participant custom data is currently not supported but you can insert them manually.

Where Does the Template Load In Actionstep? Under the Matter Type? Does This Work for Email Templates?

As discussed above the template loads against a matter type but does not save to any folders within that matter. You can either go into Actionstep once a document template has been published and move to a folder so you can see the template from within the matter or click on the generate button in the matter and this will give you a list of all templates against that matter type and all matter types and you can select from the list.
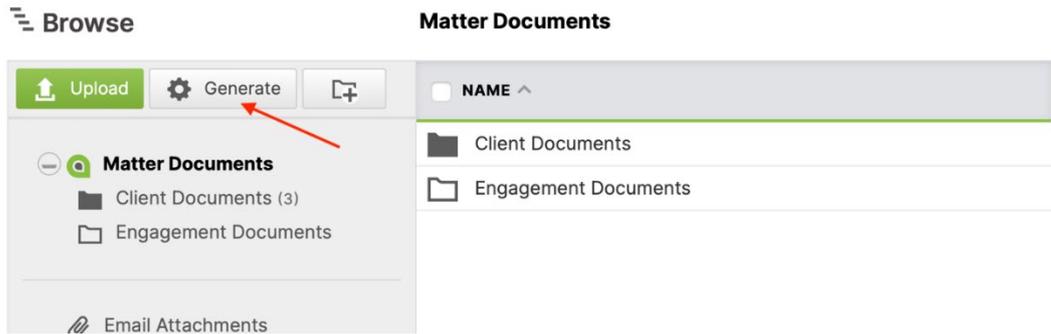
Email templates are created from within Actionstep so no you cannot use the word add-in to create email templates.

Can You Use the Template Builder for Invoice Templates?

No, unfortunately the word add-in is for matter type document templates only. Not invoice/trust statement templates – you can still create and edit invoice/trust statements, but you have to do this manually.

Is the Tool Available for MS365 Home? It Does Look Like MS365 Home Works With The Add-On

As with all our office add-in offerings our advice is that you have a Microsoft 365 Business Subscription for best performance.

How Inserting A Client Name Work If There Is More Than One Client?

There are several ways to show multiple clients if it is just a list then you could use FirstNameLastNameList – which will give a list of the first name and last name of all clients on a matter. You can use a repeat block if you want certain text for each client, for example each client and their address or even a repeat block if you would like to print a different letter for each client. An example of one is here (see client authority (part 4).

I Do Not Understand Why You Associate A Template with A Client Matter

Normally a document template is associated with a type of matter for example, a Will however sometimes you may have templates that you want

associated with every matter for example a dated letterhead or a client authority. I would suggest having a universal matter type for universal templates called for example, 1. Lawfirm Templates this way when selecting a document to generate from the generate button you will first get any document templates associated with the matter type you are in and then next on the list is ALWAYS 1. Lawfirm templates (as there is a 1. So it will show first).

If you use this method and the word add-in make sure your participants on the matter match what is in your universal templates and you could even create a dummy 1. Lawfirm Matter with clients details etc to test out any universal templates you create.

Note: you will not be able to access custom data from different matter types – however if you are needing to access custom data fields from a different matter type then the template arguably belongs to matter type and is not a universal template.

Will This Tool Also Allow Us to Prepare Invoices, Receipts Etc. That Are Used in Actionstep?

No, the tool is only for use with matter type template documents not invoice/trust/receipts.

In the Date Format as A UK User – I Think There Should Be an Option To Have 16 March 2021 As Well As The MM DD YY Choice.

The current options for date are as below
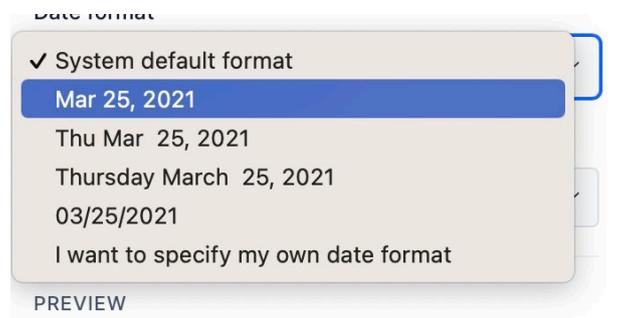
The System Default should show the date as per your region. If this format is not correct you can adjust your date preference in Actionstep.

You can also specify your own date so if you wanted the date to show as you have suggested **16 March 2021 then you can select 'I want to specify my own date format'**

fm= %-e %B %Y and this will be in the format as shown below.

Can I Download A Template, Work on It and Save Over the Old Template?

Unfortunately, no when a template is downloaded to the word add-in it is a new document and you can edit it and the merge fields but when you publish it back to Actionstep (even if you name the document the same name as the one you downloaded) a new document template will be uploaded. So just be careful when working on old document templates as you may need to manually remove the old one when a new one has been created in its place.