



## Document Templates Webinar Follow-up

As promised, please find helpful links from the user guide that I used during the workshops:

- Pronouns for Merge Fields - <https://intercom.help/actionstep/en/articles/3523472-pronouns-for-merge-fields>
- Conditional Merge Fields - <https://intercom.help/actionstep/en/articles/4638463-conditional-merge-fields>
- Calculated Merge Fields - <https://intercom.help/actionstep/en/articles/4638465-calculated-merge-fields>
- Merge Field Options - <https://intercom.help/actionstep/en/articles/3523466-merge-field-options>
- Installing the Work Add-in (template builder) - <https://intercom.help/actionstep/en/articles/4817267-installing-the-office-365-actionstep-for-word-add-in>
- Using the Word Add-in (template builder) – <https://intercom.help/actionstep/en/articles/4887013-using-the-word-add-in-template-builder-for-office-365-only>

Also please find attached: -

- Some letterhead examples – you will find a range of merge field options used in these and also REPEAT blocks.
- Client Authority – Good example of a REPEAT Blocks.

Pro tips:

1. You can set up a custom data field to be a dropdown list or a Boolean and then use an IF statement to bring in a clause, for example in the Will example used in the workshop: -

```
[[*IF {Will_Info_Donate}=="Yes"*]]
```

```
7.2 I wish to donate my organs.
```

```
[[*ENDIF*]]
```

Where Will\_Info is my data collection Donate is the name of my custom data field and it is a single select dropdown with options "Yes" and "No".

2. You can use Selected user and Current user through the document assembly tool when creating your templates, if you use Selected User this means you can generate that template for any user against the matter and if you use the current user, it means this will bring in the merge fields against the person currently signed into Actionstep generating the document.

To generate selected user template, you click on the participant on the matter and generate the document from their bringing in that selected user's details.

**Role** **Party**

Choose a Role

Role	Parties
Lawyer	   ABC Hamilton <a href="mailto:duncan.mcdougall@actionstep.com">duncan.mcdougall@actionstep.com</a> +64 09 6
Mortgage Broker	
Mortgagee	
Other Party Client	
Other Party Lawyer	
Partner	

 Remove Party

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 Edit Data

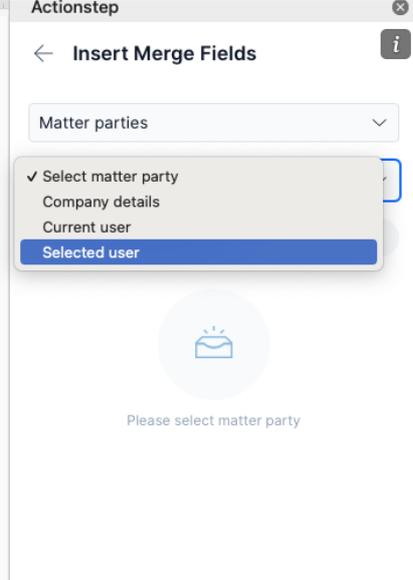
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 Generate 2019 Fees and Disbursements

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 Generate draft engagement letter (to be finished)

The selected or current user can be entered from the Insert Merge Field Toolbar – select Matter Parties – then select matter party, as below:



Actionstep

← Insert Merge Fields 

Matter parties

- ✓ Select matter party
- Company details
- Current user
- Selected user



Please select matter party

3. You cannot have a conditional merge field block within a conditional merge field block. However you can have a conditional merge field that deletes a row and then a series of conditional fields. This is useful in the scenario where you want to have a clause show sometimes and not others but to have conditional merge fields in the clause as well. If you put that clause into a table (even if it is one cell) and then open the clause with **[[ \*IF {something} == "Something" \*]]** **[[\*DELETEROW\*]]** **[[\*ENDIF\*]]**. If the condition is met, it will remove the row in the table (i.e., the whole clause), if it is not it is ignored and the clause is shown including its other conditional merge fields.
4. You can use that delete row conditional statement in a repeat block to only show selected values in a multi-row custom data collection. I.e., only show records where the date is before 1 Jan. or only show rows where the value of an asset is unknown.