Document Template Design

Now that you've gotten started with Amicus Cloud document assembly and are editing or creating templates, here's a reference guide you might find handy to consult. It details the template command syntax, lists all the Amicus variables, and includes formatting tips.

Getting started

Getting Started with Amicus Document Assembly guide	Introduction to Amicus document assembly
"Document Assembly" Help topics in Amicus Cloud	Instructions on viewing templates, editing templates with the Amicus Template Editor, and generating documents

Tips on creating document templates

A *template* is a document blueprint designed with specific formatting and both variable and unchanging content, and then used over and over again to generate new documents and emails. Templates can be created in various ways:

- Create a template in the online Amicus Editor. Enter and format text. Insert variables and commands by simply selecting them from menus. Customize the provided sample templates if you like, or start from scratch.
- Create in Word or an HTML editor. Then upload your document (in .docx, .html, or .htm format) to Amicus as an Amicus Editor template. Start from your existing letters and forms!
- Create in Word. Enter and format text. Use the Amicus Cloud Office Add-in to insert variables and commands by simply selecting them from menus. Then upload your document (in .docx format) to Amicus as an Amicus Word template. Keep your existing letters and forms, complete with their formatting!

What's output for the variables?

Whenever a document is generated from a template, data values are substituted for the variables. E.g., "Bailey re Kipling" appears in place of "[[File.Short_File_Name]]".

If the value for a variable is unavailable in Amicus, a blank or "(No data found)" is shown instead (e.g., you might not have the home address for a contact, or there might not be any time entries on a file).

Check your templates!

Review your template's commands and variables. To highlight them for easy inspection, click the Highlight Syntax button ¶ on the toolbar in the Amicus Editor (or click Show Syntax on the Amicus Office Add-In ribbon in Word).

Check that all your variables work as intended. Generate a document from the template, selecting a file and/or contact that have information stored in all the relevant fields, and then inspect the results.

If a variable is missing one of its brackets, or the syntax of a command is incorrect, it will be output as is, making it easy to spot. E.g., the variable "[Contact.Full_Name]]" would appear just like that in the generated document because it's missing one of its initial brackets. This kind of problem should be fixed while you're designing and testing a new template or editing one.

Note that when a new template is uploaded to Amicus Editor, the syntax is automatically checked and a warning appears in the Description field if any unmatched {{ }}, [[ ]], or ^^ ^^ characters were found.

You should also check the generated Word or PDF format output (whichever will be used) to ensure that the results are as you expect.

Sample templates

Several templates are provided for your inspection and use. Some can be used as is, some illustrate the power of document assembly, and some provide elements that can be included in your working templates.

Amicus Small Firm templates

[For Amicus Editor templates only.]

If you upload a template created in Amicus Small Firm (in .docx format) to the Amicus Editor, any variables that correspond directly to Amicus Cloud variables are automatically converted as appropriate. All other syntax and variables (including Custom Information variables) are left as is, unconverted.

To complete the conversion, edit the template further as appropriate, and check that the generated results are as expected.

All about variables

A *variable* is a placeholder that tells document assembly what data to retrieve from Amicus. A variable corresponds to a field in Amicus (or Exchange). It has the following format:

[[PrimaryCategory.AttributeName**]]**

Double square brackets [[ ]] separate a "variable" from other text in the template.

Attribute name

A variable's *attribute name* contains no spaces but can include underscores for readability. Upper/lower case doesn't matter—e.g., both "First_Name" and "first_name" are valid, but "First Name" isn't.

Categories

Most variables start with a *primary category* (record set) that indicates an area of Amicus. E.g., "File**.**Name" is the name of the file, while "Firm**.**Name" is name of your firm. A period separates the category from the attribute. These are the primary categories:

File
Contact
Firm
My

Sometimes a *secondary category* is needed as well. A period separates the categories. E.g., in "File.Primary_Client.Name", "Primary_Client" is a secondary category under the primary category "File".

[[PrimaryCategory.SecondaryCategory.AttributeName**]]**

Examples

[[File.Name]]
> Name of the file.
> *Sample output:* Baily re Kipling

[[File.Matter_Id]]
> Matter ID of the file.
> *Sample output:* 2345

[[File.Trust_Balance]]
> Current trust balance on the file.
> *Sample output:* $3,425.55

[[File.Primary_Client.First_Name]]

First name of the primary client on the file.
Sample output: Janet

[[Contact.Full_Name]]

Full name of the contact.
Sample output: Mr. John J. Richardson

[[Contact.Business_Phone]]

Business phone number of the contact.
Sample output: (613) 555-8844

[[Firm.Name]]

Your firm's name.
Sample output: Donnell, Young & Dole LLP

[[My.Email_Address]]

Email address of the firm member generating the document.
Sample output: bdonnell@dydlaw.com

[[Today]]

Today's date.
Sample output: Tuesday, October 22, 2013

Custom variables

Your firm's own file and contact custom fields are available as variables. The variable *names* must be specified, not the variable *labels*. They can be selected from a dropdown list in the Amicus Editor or Amicus Cloud Office Add-in.

Examples

[[File.Court_Action_Number]]

Court action number for a file.
Sample output: 34966

[[Contact.Date_Of_Birth]]

Birth date of a contact.
Sample output: Monday, February 27, 1956

List-type variables

Some variables automatically output a list of values instead of just one value—e.g., a list of time entries on a file.

Examples

[[File.People]]

List of all the contacts on a file.

Sample output:

	R. Kipling	Editor	1879 Franklin Street Chicago IL 30344	+1 (312) 555-9987	kipling@firsteditonpub.con
Mr.	Douglas Brackman	Partner	2139 First Street New York NY 10023	+1 (212) 555-1286	dbrack@brackmcken.com
Ms.	Janet Baily		Maple Ridge Farm Picton ON K1V 5R5 Canada	1 (613) 555-8844	jbaily@houseofgrantinc.com

[[Contact.Files]]

List of all the files for the contact.

Sample output:

Blanck vs Bittle
Blanck Purchase From Smithers

[[My.Tasks]]

Tasks assigned to the firm member generating the document.

Sample output:

Bobby Donnell	4/3/2013	4/3/2013	Not Started	Berwood vs Wright	0.00 %		High
Bobby Donnell	4/19/2013	1/1/4450	Not Started	Gallagher Will	0.00 %		Normal

Variable formats

You can override the default output format for certain types of variables—e.g., the date format for a date variable.

[[Variable **FORMAT** *FormatType***]]**

Example

[[File.Open_Date FORMAT SHORT]]

Date the file was opened, in short format rather than long format.

Sample output: 02/24/2013

Date formats

Format Type	Sample Output
LONG (default)	Monday, February 24, 2014
SHORT	02/24/2014
FULL	February 24, 2014
LEGAL	24th day of February, 2014
(Custom format, see below.)	

where LONG and SHORT format output is further controlled by the LOCALE command—see "LOCALE command" on page 11.

Custom date formats: Optionally specify a particular format by using the following codes (where sample output is for Friday, February 7, 2014):

Date code	Meaning	Sample Output
d dd	Day of the month (numeric): without or with leading zero where appropriate	7 07
ddd dddd	Day of the week: first 3 letters or full name	Fri Friday
M MM	Month (numeric): without or with leading zero where appropriate	2 02
MMM MMMM	Month: first 3 letters or full name	Feb February
yy yyyy	Year: first 2 digits or full	14 2014

For example:

Custom Format	Sample Output
dd/MM/yy	24/02/14
MMM dd, yyyy	Feb 24, 2014

Number formats

Regular format numbers output with comma and decimal separators (e.g. "1,234,567.89").

Format Type	Sample Output
CURRENCY (default for some variables)	$1,234,567.89
PERCENTAGE (default for some variables)	12.34 %
NONE	123456789
LATIN	MCMLXVII

where CURRENCY, PERCENTAGE, and regular format output may be affected by the LOCALE command—see "LOCALE command" on page 11.

Text case formats

Regular format text outputs with upper and lower case letters as entered (e.g. a file billing status of "Non-bill- prof. dev.").

Format Type	Meaning	Sample Output
CAPALL	Capitalize all letters.	NON-BILL- PROF. DEV
CAPTITLE	Capitalize as a title.	Non-Bill- Prof. Dev
CAPFIRST	Capitalize first character (and leave other letters capitalized as entered).	Non-bill- prof. dev

where CAPTITLE format output may be affected by the LOCALE command—see "LOCALE command" on page 11.

Spelled-out formats

Numeric variables are normally output as digits (e.g. 296.12), and currency variables as digits following a dollar sign (e.g. $296.12).

Format Type	Meaning	Sample Output
TEXT	Output as words.	two hundred and ninety-six point one two
CURRENCYTEXT	Output as words.	Two hundred ninety six dollars and twelve cents

List formats

To change the default way that items are separated in a *list*, use a REPEAT command with the list-type variable—see "How is the list formatted?" on page 17.

Using commands for advanced results

Use commands to add "intelligence" to your templates—**commands** are special statements that define settings for the document, or detail which Amicus fields under which conditions should supply what information.

{{Command}}

Double braces {{ }} separate a command from other text in the template. Upper/lower case doesn't matter—e.g., both "INSERT" and "Insert" are valid.

Commands:

May be used **once** in a template	HEADER, FOOTER, PAGEMARGINS, PAGEORIENTATION, PAGESIZE, LOCALE, EMAILSUBJECT
May be used **many times** in a template	INSERT, COMMENT, IF, REPEAT

HEADER and FOOTER commands

[In Amicus Word templates, use Word's own header and footer functions instead of these commands.]

Include a header or footer in the generated Word or PDF document by including the output from a header or footer template that's referenced in the template you're generating. A footer will be output at the bottom of every page. A header will be output at the top of every page starting with page 2.

Use one or both of these commands only once in a template.

{{HEADER *TemplateName***}}**

{{FOOTER *TemplateName***}}**

This header or footer is not shown on the generated results screen, but is included in the Word or PDF document that's saved. Note that at the time of printing a document from Chrome, you have the option of suppressing your usual browser-generated header and footer.

If you want the header to appear on *all* pages, including the first, use the following command.

{{HEADER *TemplateName* ALLPAGES**}}**

Example

{{FOOTER Letter Footer}}

Insert the output from your "Letter Footer" template (which could specify your firm's name, brief contact information, and page number) within the current template (which could be a standard statement sent to new clients).

Sample output:

Donnell, Young & Dole LLP	Tel. (617) 555-8800	www.dylaw.com	2

Page-numbering variables

[[P#]]	Page number, for use in a header or footer.
[[#P]]	Total number of pages, for use in a header or footer.

Alternative method

If you import a new template from a Word document that has a header and footer, they are preserved and will be output in generated documents saved to Word.

PAGEMARGINS command

[In Amicus Word templates, use Word's own page margins function instead of this command.]

Page margins for the generated Word or PDF document, in inches. The default margins are 1 inch. You need only specify those that are different, separated by a semicolon.

Use this command only once in a template.

{{PAGEMARGINS TOP=*Amount*;BOTTOM=*Amount*;LEFT=*Amount*;RIGHT=*Amount***}}**

Example

{{PAGEMARGINS BOTTOM=2;LEFT=1.5}}

Margins will be top=1 inch, bottom=2 inches, left=1.5 inch, right=1 inch.

PAGEORIENTATION command

[In Amicus Word templates, use Word's own page orientation function instead of this command.]

Page orientation for the generated Word or PDF document. The default is portrait.

Use this command only once in a template.

{{PAGEORIENTATION *Type***}}**

where Type is PORTRAIT or LANDSCAPE.

Example

{{PAGEORIENTATION LANDSCAPE}}

Orientation will be landscape.

PAGESIZE command

[In Amicus Word templates, use Word's own page size function instead of this command.]

Page size for the generated Word or PDF document. The default is letter (8.5 x 11 inches).

Use this command only once in a template.

{{PAGESIZE *Type***}}**

where Type is LETTER, LEGAL, EXECUTIVE, A3, A4, A5, A6, COM10_ENF, MONARCH_ENV, DL_ENV, C6_ENF, or CS_ENV.

or:

{{PAGESIZE *HEIGHT=Amount;WIDTH=Amount***}}**

where you can specify the height and/or width, in inches.

Examples

{{PAGESIZE LEGAL}}

Legal size pages.

{{PAGESIZE HEIGHT=3.5;WIDTH=5}}

3.5 x 5 inch pages.

LOCALE command

Regional settings for date (LONG and SHORT formats), number, and title-capitalized text formats. E.g., a currency value could be output as $1,234,567.98 or 1.234.567,98 €, depending on this setting.

Use this command only once in a template.

{{LOCALE *Type*}}

Locale Type
UNITED STATES (default)
CANADA
CANADA FRENCH
UNITED KINGDOM
AUSTRALIA
FRANCE
SPAIN
SPANISH MEXICO
GERMANY

or specify a Language Culture Name, such as "en-PH" for English-Philippines—see the first column in the list provided here.

Example

{{LOCALE FRANCE}}

Dates, numbers, and title-capitalized text will be output from this template in French style.

EMAILSUBJECT command

[For Amicus Editor templates only. Amicus Word templates do not support email generation.]

Include a subject in generated emails by directly specifying what to say, or by referencing a subject template that supplied the subject content.

Use this command only once in a template.

{{EMAILSUBJECT *Content***}}**

{{EMAILSUBJECT *TemplateName***}}**

Examples

{{EMAILSUBJECT Your Invoice}}

Because "Your Invoice" is not the name of a template, simply insert that text in the subject field of the client emails generated from batch billing. (The email template for batch billing is selected in the Billing Options for the firm.)

Sample output:

{{EMAILSUBJECT Your Invoice from [[Firm.Name]]}}

Because "Your Invoice from [[Firm.Name]]" is not the name of a template, simply insert "Your Invoice from" and [[Firm.Name]] in the subject field of the client emails generated from batch billing.
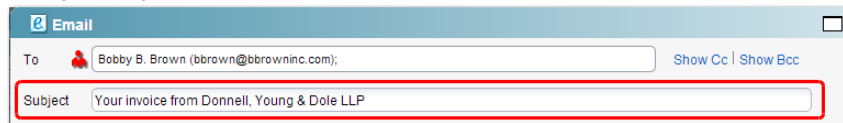
Sample output:

{{EMAILSUBJECT Bill Email Subject}}

Because "Bill Email Subject" is the name of a template, insert its output (e.g., "Your Invoice from" and [[Firm.Name]]) in the subject field of the client emails generated from batch billing.

Sample output:

INSERT command

[For Amicus Editor templates only]

Include the output from another template inside the output of this template. By using multiple INSERT commands, you can create a template that's assembled from a variety of boilerplate templates, such as a letterhead, a greeting, some common clauses or summaries, some standard text, and a signature block.

{{INSERT *TemplateName***}}**

Examples

{{INSERT Letterhead}}

Insert the output from your "Letterhead" template (which specifies your firm's logo and contact information in a nice format) within the current template (which could be a standard statement sent to new clients).

Sample output:

Donnell, Young & Dole LLP

2 Center Plaza, Suite 4100, Boston MA 02108

Tel: 617-555-8800   Fax: 212-555-4216

www.dydlaw.com   info@dydlaw.com

_____

{{INSERT Envelope}}

Insert the settings from your "Envelope" template (page size and margins) within the current template.

COMMENT command

Text shown only in the template, not included in output.

{{COMMENT *Text***}}**

Example

{{COMMENT For this template, specify a file and a contact. Custom variables for file type "Real Estate" are included.}}

If the specified condition is met, then output as defined. E.g., if a non-zero balance is owing on the file, then output a phrase that requests payment. An IF command can output anything from nothing (if the condition is not met) to a short phrase to a multi-paragraph section that includes several variables.

{{IF Condition **THEN ^^**Output**^^}}**

TIP: If you are entering IF commands in Word, first disable the AutoCorrect option for replacing "straight quotes" with "smart quotes".

Condition section

Compares the value of a variable to a test value (text, numeric, or another variable). E.g., it can check whether the file's AR balance is greater than $1,000. Only simple variables are supported, not list variables.

{{IF [[Variable**]]** *Operator* **"**TextString**" THEN ^^**Output**^^}}**

{{IF [[Variable**]]** *Operator* **"**NumericValue**" THEN ^^**Output**^^}}**

{{IF [[Variable**]]** *Operator* **[[**Variable**]] THEN ^^**Output**^^}}**

For some Operators, you can simply check whether the value is true, false, or empty:

{{IF [[Variable**]]** *Operator* **THEN ^^**Output**^^}}**

Operator	Meaning
IS	Is equal to
IS NOT	Is not equal to
IS GT	Is greater than
IS GTE	Is greater than or equal to
IS LT	Is less than
IS LTE	Is less than or equal to
IS TRUE	Boolean variable is true (flag is selected)
IS FALSE	Boolean variable is false (flag is not selected)
IS EMPTY	Variable is empty (it has no value)
IS NOT EMPTY	Variable is not empty (it has a value)
IS BEFORE	Date is before
IS NOT BEFORE	Date is not before
IS ON	Date is on
IS NOT ON	Date is not on
IS AFTER	Date is after
IS NOT AFTER	Date is not after
IS LIKE	Text contains
IS NOT LIKE	Text does not contain

Text formatting

In Amicus Word templates, apply your desired formatting (e.g. bold) to the entire IF command, not to just its Output or Alternative Output text.

Examples

{{IF [[File.AR_Balance]] IS GT "1000.00" THEN ^^Please pay immediately.^^}}

> If the file's Accounts Receivable balance is more than a thousand dollars (the condition is met), then output the text.
>
> *Sample output:* Please pay immediately.

{{IF [[File.AR_Balance]] IS LT [[File.Retainer.Balance]] THEN ^^The amount owing is covered by your retainer.^^}}

> If the file's Accounts Receivable balance is more than the retainer balance (the condition is met), then output the text.
>
> *Sample output:* The amount owing is covered by your retainer.

{{IF [[File.Status]] IS NOT "Closed" THEN ^^[[File.Name]] opened on [[File.Open_Date]]^^}}

> If the file isn't closed, output its name and the date it was opened.
>
> *Sample output:* Baily re Kipling opened on Tuesday, November 19, 2013

{{IF [[File.Close_Date]] IS BEFORE "08/01/13" THEN ^^[[File.Name]] closed on [[File.Close_Date]]^^}}

> If the file was closed before August 1, 2013, output its name and the date it was closed.
>
> *Sample output:* Henderson Purchase closed on Thursday, May 16, 2013

{{IF [[File.Name]] IS LIKE "ipl" THEN ^^[[File.Name]], opened for [[File.Primary_Client.First_Name]] [[File.Primary_Client.Last_Name]]^^}}

> If the file's name contains the text string "ipl", output its name and the name of its primary client.
>
> *Sample output:* Baily re Kipling, opened for Janet Baily

THEN output section

What to output if the condition is met. This output section must be enclosed in double carat symbols, and can include both text and variables.

{{IF Condition THEN ^^Output^^}}

Example

{{IF [[File.AR_Balance]] IS GT "1000.00" THEN ^^Please call me, [[File.Responsible_Lawyer.Name]], at [[Firm.Phone]] to discuss terms of payment. ^^}}

> If the file's Accounts Receivable balance is more than a thousand dollars, output the text and variables specified (the name of the responsible lawyer on the file, and firm's phone number).
>
> *Sample output:* Please call me, Bobby Donnell, at (617) 555-8800 to discuss terms of payment.

ELSE output section

What to output if the condition is NOT met – use an ELSE section only if you want any output in that case. This section must be enclosed in double carat symbols, and can include both text and variables.

{{IF Condition **THEN ^^**Output**^^ ELSE ^^**AlternativeOutput**^^}}**

Examples

{{IF [[File.AR_Balance]] IS GT "1000.00" THEN ^^Please call me, [[File.Responsible_Lawyer.Name]], at [[Firm.Phone]] to discuss terms of payment.^^ ELSE ^^Please pay promptly.^^}}

> If the file's Accounts Receivable balance is more than a thousand dollars, output a "please call" message with the name of the responsible lawyer on the file, and the firm's phone number. Otherwise just output a "please pay promptly" message.
>
> *Sample output:* Please pay promptly.

{{IF [[Contact.Home_Address_City]] IS "Boston" THEN ^^Please call us at 456-977-6633.^^ ELSE ^^Please call our toll free number at 1-800-472-2289.^^}}

> If the contact's city is Boston (where the firm is located), then output a local telephone number. Otherwise output a toll free number.
>
> *Sample output:* Please call us at 456-977-6633.

I, [[Contact.Full_Name]], make oath and say as follows:
{{IF [[Contact.Marriage_Status]] IS "Married" THEN ^^My spouse's name is [[Contact.Spouse_Name.]] ^^ ELSE ^^I am not married.^^}}

> If the contact is married, output a statement that indicates their spouse's name. Otherwise output a statement that says they are not married.
>
> *Sample output:* I make oath and say as follows: My spouse's name is Bill Smithers.

IF command within a REPEAT command

Controls which items are output from a list-type variable. See "Which items are output from a list-type variable?" on page 18.

REPEAT command

Controls how some list-type variables (such as people on the file) are output—that is, which variables are output for each item, how the list is formatted, and which set of items are included.

For a list of the list-type variables available, see the "List-type variables" section on page 28.

Which variables are output for the items in a list?

Each list-type variable outputs a particular set of fields—see "List-type variables" on page 28.

For [[File.People]], [[File.Clients]], and [[Contact.Files]], however, you can override the default set. Use a REPEAT command with the desired output fields (variables) enclosed in double carats.

{{REPEAT [[ListVariable**]] ^^**Output**^^}}**

where the output could be text and/or variables.

Example

{{REPEAT [[File.People]] ^^[[File.People.First_Name]] at [[File.People.Email1]]^^}}

> List of contacts on the file, showing only their first name and email address.
> *Sample output:* Jim at jimk@themegabank.com, Tanya at tralsky@gmail.com

{{REPEAT [[Contact.Files]] ^^[[Contact.Files.Name]] ([[Contact.Files.Client_Matter_ID]])^^}}

> List of files for the contact, showing the file name and client/matter ID for each.
> *Sample output:* Blanck v. Bittle (BLAHA/12003), Blanck Purchase From Jones (BLAHA/12002)

How is the list formatted?

By default, the items from a list-type variable are output either as rows in a table or, if particular fields are specified, as a comma-separated list.

For [[File.People]], [[File.Clients]], and [[Contact.Files]], however, you can override the default formatting. Use a REPEAT command with a FORMAT section.

{{REPEAT [[ListVariable**]] FORMAT** *FormatType***}}**

Or, if also specifying which variable(s) are output for each item:

{{REPEAT [[ListVariable**]] ^^[[**Variable**]] [[**Variable**]]^^ FORMAT** *FormatType***}}**

Format Type	Description
COMMA	Output a comma and space between items.
SEMICOLON	Output a semicolon and space between items.
NONE	Output only a space between items.
TABLE	Output a table with each item on a separate row.

where:

- NONE outputs any structural formatting in the ^^Output^^ section of the command—e.g. a line break.
- TABLE skips any text or structural formatting in the ^^Output^^ section of the command.

Examples

{{REPEAT [[File.People]] ^^[[File.People.Full_Name]]^^ FORMAT SEMICOLON}}

List of contacts on the file, with a semicolon between each. Their full names are output.

Sample output: R. Kipling; Mr.Douglas Brackman; Ms. Janet Baily

{{REPEAT [[File.People]] ^^[[File.People.Full_Name]] [[File.People.Business_Phone]]^^ FORMAT TABLE}}

List of contacts on the file, in a table with each contact on a separate row, with their full name in the first column and their phone number in the second column.

Sample output:

R. Kipling	(312) 555-9987
Mr. Douglas Brackman	(212) 555-1286
Ms. Janet Baily	(613) 555-8844

Line break between items in a list

To output a line break between items, simply enter a line break in the statement, before the end double carats:

{{REPEAT [[ListVariable**]] ^^[[**Variable**]] [[**Variable**]]**
^^ FORMAT NONE}}

Numbering items in a list

To automatically number the items output from a list-type variable, include [[##]] in the statement:

{{REPEAT [[ListVariable**]] ^^[[##]] [[**Variable**]] [[**Variable**]]**
^^ FORMAT NONE}}

This numbering sequence is for this list-type variable's items only, separate from the numbering of items output from other lists and from any other numbering in the document.

Example

{{REPEAT [[File.People]] ^^[[##]]. [[File.People.Full_Name]] ([[File.People.Role]]) ^^ FORMAT NONE}}

List and number the file's contacts.

Sample output:

1. R. Kipling (Party)
2. Mr. Douglas Brackman (Lawyer)
3. Ms. Janet Baily (Client)

Text formatting

In Amicus Word templates, apply your desired formatting (e.g. bold) to the entire REPEAT command, not to just its Output text.

Which items are output from a list-type variable?

By default, *all* items accessible to you are output.

For [[File.People]], [[File.Clients]], and [[Contact.Files]], however, you can limit which are output. Use an IF command within the REPEAT command.

{{REPEAT [[ListVariable**]] IF** *ConditionModifier* **THEN ^^[[**Variable**]] [[**Variable**]]^^ FORMAT** *FormatType* **}}**

Examples

{{REPEAT [[Contact.Files]] IF [[File.Type]] IS NOT "Litigation" THEN ^^[[File.Name]]^^ FORMAT SEMICOLON}}

List the contact's files that aren't of Litigation type.

Sample output:

Blonck Purchase from Bittle; Blonck Will

{{REPEAT [[File.People]] IF [[File.People.Role]] IS "Lawyer" THEN ^^[[File.People.Full_Name]] [[File.People.Company_Name]] [[File.People.Business_Phone]]^^ FORMAT TABLE}}

For each of the contacts who have a "Lawyer" role on the file, output their name, company name, and business phone number. Use a table format for this list.

Sample output:

| Mr. Philip J. Agrarian | Agrarian, Billman & Canta | 555-6398 |
| Mr. Hugh G. Forrest | Green, Forrest & Wood | (312) 555-4909 |

List of variables

The standard variables available for use in templates are listed here. You can use your firm's file and contact custom variables as well.

List-type variables are detailed at the end of this section.

TIP: You can copy-and-paste these variable names into your templates.

File variables

Fields on the file that's chosen when a document is generated.

Your firm's own *file custom fields* can also be used as template variables.

File – Basic variables	Sample output	Notes
[[File.Name]]	Baily re Kipling	
[[File.Summary]]	Our client Janet Baily is a lawyer and an author of mystery stories. Janet's publisher, has refused to release her latest book, and has withheld a promised advance on royalties.	
[[File.Full_Matter_Name]]	Janet Baily v. First Edition Publishing	.
[[File.Referral_Source]]	Existing client	
[[File.Matter_ID]]	2345	Text.
[[File.Open_Date]]	Tuesday, February 19, 2013	
[[File.Close_Date]]		
[[File.Status]]	Active	
[[File.Type]]	Civil Litigation	
[[File.Responsible_Lawyer.Name]] [[File.Responsible_Lawyer.First_Name]] [[File.Responsible_Lawyer.Middle_Name]] [[File.Responsible_Lawyer.Last_Name]] [[File.Responsible_Lawyer.Timekeeper_ID]] [[File.Responsible_Lawyer.Email_Address]] [[File.Responsible_Lawyer.Email_Signature]] [[File.Responsible_Lawyer.Bills]] [[File.Responsible_Lawyer.Payments	Bobby Donnell	*For details of the Bills and Payments list-type variables, see the final section.*

File – Basic variables	Sample output	Notes
[[File.Primary_Client.Name]] [[File.Primary_Client.Mailing_Address]] [[File.Primary_Client.Job_Title]] etc.	Ms. Janet Baily	These are like the basic, address, and email variables for a Contact, except here they are for the primary client on the file.
[[File.Client_Matter_ID]]	BALJA/2345	Slash used only if both Client ID and Matter ID are present.
[[File.Client_ID]]	BALJA	Text.

File – Billing variables	Sample output	Notes
[[File.Fixed_Fee_Amount]]	$1000.00	
[[File.Billing_Status]]	Billable	
[[File.Tax1]]	4.00 %	
[[File.Tax2]]	0.00 %	
[[File.Billing_Rate_Name]]	Normal (Default Rate)	
[[File.Billing_Rate_Value]]	$200.00	
[[File.Trust_Balance]]	$0.00	
[[File.Retainer_Balance]]	$0.00	
[[File.AR_Balance]]	$375.50	
[[File.WIP_Balance]]	$1,345.00	
[[File.Total_Payments]]	$753.42	
[[File.Trust_In_Totals]]	$0.00	Total trust inflow
[[File.Trust_Out_Totals]]	$0.00	Total trust outflow
[[File.Last_Payment_Amount]]	$588.66	
[[File.Last_Payment_Date]]	Wednesday, August 14, 2013	
[[File.Last_Invoiced_Date]]	Monday, September 30, 2013	
[[File.Last_Invoiced_Amount]]	$375.50	
[[File.Bills]]	*For details of these list-type variables, see the final section.*	
[[File.Payments]]		

File – List variables	Sample output	Notes
[[File.People]]	*For details of these list-type variables, see the final section.*	
[[File.Clients]]		
[[File.Emails]]		

File – List variables	Sample output	Notes
[[File.My_Emails]]		
[[File.Appointments]]		
[[File.My_Appointments]]		
[[File.Tasks]]		
[[File.My_Tasks]]		
[[File.Time_Entries]]		
[[File.My_Time_Entries]]		
[[File.Expenses]]		
[[File.Documents]]		
[[File.My_Documents]]		
[[File.Phone_Calls]]		
[[File.My_Phone_Calls]]		
[[File.Notes]]		
[[File.My_Notes]]		

Contact variables

Fields on the contact that's chosen when a document is generated. Your firm's own *contact custom fields* can also be used as template variables.

Contact – Basic variables	Sample output	Notes
[[Contact.Job_Title]]	President	
[[Contact.Suffix]]		From Exchange
[[Contact.Prefix]]	Ms.	
[[Contact.First_Name]]	Janet	
[[Contact.Middle_Name]]	K.	From Exchange
[[Contact.Last_Name]]	Baily	
[[Contact.Full_Name]]	Ms. Janet K. Baily	Company_Name shown instead if a corporation
[[Contact.Company_Name]]	House of Grant Inc.	
[[Contact.Main_Note]]	Cottage: (705) 555-4545 Newsletter Christmas Mailing	
[[Contact.Show_As]]	Baily, Janet (House of Grant Inc.)	
[[Contact.QuickBooks_ID]]	Janet Baily	QuickBooks user ID
[[Contact.Assistant]]		

Contact – Basic variables	Sample output	Notes
[[Contact.Client_ID]]	BAI037	Text
[[Contact.Business_Website]]		From Exchange
[[Contact.Name]]	Ms. Janet Baily	Company_Name shown instead if a corporation
[[Contact.Is_Company]]	False	
[[Contact.Web_Page]]		From Exchange

Contact – Address variables	Sample output	Notes
[[Contact.Mailing_Address]]	123 Warming Blvd. Toulane, WS 12389 0453	
[[Contact.Business_Address]]	123 Warming Blvd. Toulane, WS 12389 0453	
[[Contact.Business_Address_Street]]	123 Warming Blvd.	
[[Contact.Business_Address_City]]	Toulane	
[[Contact.Business_Address_State]]	WS	
[[Contact.Business_Address_ZIP]]	12389 0453	
[[Contact.Business_Address_Country]]		
[[Contact.Other_Address]]		
[[Contact.Other_Address_Street]]		
[[Contact.Other_Address_City]]		
[[Contact.Other_Address_State]]		
[[Contact.Other_Address_ZIP]]		
[[Contact.Other_Address_Country]]		
[[Contact.Home_Address]]		
[[Contact.Home_Address_Street]]		
[[Contact.Home_Address_City]]		
[[Contact.Home_Address_State]]		
[[Contact.Home_Address_ZIP]]		
[[Contact.Home_Address_Country]]		

Contact – Phone variables	Sample output	Notes
[[Contact.Business_Phone]]	(613) 555-8844	
[[Contact.Mobile_Phone]]		
[[Contact.Home_Phone]]	(333) 555-7634	
[[Contact.Business_Fax]]	(613) 555-8874	

Contact – Email variables	Sample output	Notes
[[Contact.Email1]]	jbaily@houseofgrant.com	
[[Contact.Email2]]		
[[Contact.Email3]]		

Contact – List variables	Sample output	Notes
[[Contact.Files]]	*For details of these list-type variables, see the final section.*	
[[Contact.Emails]]		
[[Contact.Phone_Calls]]		

Firm variables

Firm-wide data.

Firm – General variables	Sample output	Notes
[[Firm.Name]]	Donnell, Young & Dole LLP	
[[Firm.Portal_Display_Name]]	Donnell, Young & Dole LLP	Firm name shown in Client Portal
[[Firm.Portal_URL]]	https://dyd.portal.legal/	Firm's Client Portal login page web address
[[Firm.Phone]]	(617) 555-8800	

Firm – Address variables	Sample output	Notes
[[Firm.Address]]	2 Center Plaza, Suite 4100 Boston MA 02108 United States	
[[Firm.Address_Street]]	2 Center Plaza, Suite 4100	
[[Firm.Address_City]]	Boston	
[[Firm.Address_State]]	MA	
[[Firm.Address_ZIP]]	02108	
[[Firm.Address_Country]]	United States	

Firm – List variables	Sample output	Notes
[[Firm.Files]]	*For details of these list-type variables, see the final section.*	
[[Firm.Emails]]		
[[Firm.Phone_Calls]]		

My variables

Information on the firm member who generates the document.

My – Basic variables	Sample output	Notes
[[My.Name]]	Bobby Donnell	
[[My.First_Name]]	Bobby	
[[My.Middle_Name]]		
[[My.Last_Name]]	Donnell	
[[My.Timekeeper_ID]]		
[[My.Email_Address]]	bdonnell@amicusoutlaw.com	
[[My.Email_Signature]]		

My – File variables	Sample output	Notes
[[My.Files]]	*For details of these list-type variables, see the final section.*	
[[My.Files_As_Responsible_Lawyer]]		

My – Billing variables	Sample output	Notes
[[My.Bills]]	*For details of these list-type variables, see the final section.*	
[[My.Payments]]		

My – List variables	Sample output	Notes
[[My.Contacts]]	*For details of these list-type variables, see the final section.*	
[[My.Clients]]		
[[My.Emails]]		
[[My.Appointments]]		
[[My.Appointments_Today]]		
[[My.Appointments_Week]]		
[[My.Appointments_Next_7_Days]]		
[[My.Appointments_Month]]		
[[My.Appointments_Next_30_Days]]		
[[My.Appointments_Next_30_Days]]		
[[My.Appointments_Next_30_Days]]		
[[My.Appointments_6_Months]]		
[[My.Appointments_Year]]		
[[My.Tasks]]		
[[My.Tasks_Overdue]]		
[[My.Tasks_Starting_Today]]		
[[My.Tasks_Ongoing]]		
[[My.Tasks_Week]]		

My – List variables	Sample output	Notes
[[My.Time_Entries]]		
[[My.Expenses]]		
[[My.Documents]]		
[[My.Phone_Calls]]		
[[My.Bills]]		
[[My.Payments]]		

When the document is generated, etc.

System – Basic variables	Sample output	Notes
[[Today]]	January 09, 2014	Date that the document is generated.
[[Time]]	09:46:58 AM	Time that the document is generated.
[[##]]	1 2 3 *etc.*	Number that increments each time the variable is used in the template. Useful for numbering items from a list variable.
[[P#]]	1 2 3 etc.	Page number, for use in a header or footer. [In Amicus Word templates, use Word's own page number variable instead.]
[[#P]]	14	Total number of pages, for use in a header or footer. [In Amicus Word templates, use Word's own page number variable instead.]

List-type variables

Automatically output a list of values instead of just a single value. These variables are a secondary category, separated from the primary category by a period—e.g., File.*People*, My.*Contacts*, File.*Emails*, Firm.*Files*.

Files

[[Contact.Files]]	Files associated with the contact chosen when the document is generated
[[Firm.Files]]	All files accessible by the firm member who generates the document
[[My.Files]]	Files assigned to the firm member who generates the document
[[My.Files_As_Responsible_Lawyer}}	Files on which the firm member who generates the document is the responsible lawyer

By default, outputs a list with the following information for each file.

Name

However, by using a REPEAT statement, you can specify which particular File variables to output for [[Contact.Files]]—see "Which variables are output for the items in a list?" on page 17.

People

[[File.People]]	Contacts on the file chosen

By default, outputs a table with the following information for each contact:

Prefix	Full_Name	Job_Title	Mailing_Address	Business_Phone	Email1

However, by using a REPEAT statement, you can specify which particular Contact variables to output for [[File.People]]—see "Which variables are output for the items in a list?" on page 17.

Contacts

[[My.Contacts]]	Contacts for the firm member who generates the document

By default, outputs a table with the following information for each contact.

Prefix	Full_Name	Job_Title	Mailing_Address	Business_Phone	Email1

Clients

[[File.Clients]]	Contacts who have the role "Client" on the file chosen
[[Firm.Clients]]	All contacts who have the role "Client" on files accessible by the firm member who generates the document
[[My.Clients]]	Contacts who have the role "Client" on any file, for the firm member who generates the document

By default, outputs a table with the following information for each contact:

Prefix	Full_Name	Job_Title	Mailing_Address	Business_Phone	Email1

However, by using a REPEAT statement, you can specify which particular Contact variables to output for [[File.Clients]]—see "Which variables are output for the items in a list?" on page 17.

Appointments

[[File.Appointments]]	Appointments on the file chosen
[[My.Appointments]]	Appointments on which the firm member who generates the document is an attendee or the meeting organizer
[[File.My_Appointments]]	Appointments on the file chosen, on which the firm member who generates the document is an attendee or the meeting organizer

Outputs a table with the following information for each appointment:

Subject	Location	Start_Date	Start_Time	End_Time	Attendees	(File)	Meeting_Organizer	Notes

  - File is not output from [[File.Appointments]] or [[File.My_Appointments]].

[[My.Appointments_Today]]

Outputs a table for each appointment that starts today.

[[My.Appointments_Week]]

Outputs a table for each appointment that starts this week (Sunday thru Saturday).

[[My.Appointments_Next_7_Days]]

Outputs a table for each appointment that starts within the next 7 days.

[[My.Appointments_Month]]

Outputs a table for each appointment that starts this month.

[[My.Appointments_Next_30_Days]]

Outputs a table for each appointment that starts within the next 30 days.

[[My.Appointments_Next_60_Days]]

Outputs a table for each appointment that starts within the next 60 days.

[[My.Appointments_Next_90_Days]]

Outputs a table for each appointment that starts within the next 90 days.

[[My.Appointments_6_Months]]

Outputs a table for each appointment that starts this month or within the following 5 months.

[[My.Appointments_Year]]

Outputs a table for each appointment that starts this year.

Tasks

[[File.Tasks]]	Tasks on the file chosen
[[My.Tasks]]	Tasks assigned to the firm member who generates the document
[[File.My_Tasks]]	Tasks on the file chosen, assigned to the firm member who generates the document

Outputs a table with the following information for each task:

Subject	(Assigned_ To)	Start_ Date	(Due_ Date)	Status	(File)	%_ Complete	Date_ Completed	Priority

   - File is not output from [[File.Tasks]] or [[File.My_Tasks]].
   - Assigned_To and Due_Date are not output from [[My.Tasks]].

[[My.Tasks_Overdue]]

Outputs a table for each overdue task.

[[My.Tasks_Starting_Today]]

Outputs a table for each task that starts today.

[[My.Tasks_Ongoing]]

Outputs a table for each task that's currently ongoing.

[[My.Tasks_Week]]

Outputs a table for each task that starts this week.

Emails

[[File.Emails]]	Emails on the file chosen
[[Contact.Emails]]	Emails (on a file) to or from the contact chosen
[[My.Emails]]	Emails (on a file) to or from the firm member who generates the document
[[File.My_Emails]]	Emails on the file chosen, to or from the firm member who generates the document

Outputs a table with the following information for each email:

Date	From	Subject	(File)

   - File is not output from [[File.Emails]] or [[File.My_Emails]].

Phone_Calls

[[File.Phone_Calls]]	Phone calls on the file chosen
[[Contact.Phone_Calls]]	Phone calls to or from the contact chosen
[[My.Phone_Calls]]	Phone calls to or from the firm member who generates the document
[[File.My_Phone_Calls]]	Phone calls on the file chosen, to or from the firm member who generates the document

Outputs a table with the following information for each phone call:

Date	Start_Time	To/From	Phone	State	Description	Callback_Required	(Firm_Member)	Duration	(File)

- File is not output from [[File.Phone_Calls]] or [[File.My_Phone_Calls]].
- Firm_Member is not output from [[My.Phone_Calls]].

Documents

[[File.Documents]]	Documents on the file chosen
[[My.Documents]]	Documents authored by the firm member who generates the document
[[File.My_Documents]]	Documents on the file chosen, authored by the firm member who generates the document

Outputs a table with the following information for each document (latest version):

Date	Name	Category	Author	Version	(File)

- File is not output from [[File.Documents]] or [[File.My_Documents]].

Notes

[[File.Notes]]	Notes on the file chosen
[[File.My_Notes]]	Notes on the file chosen, created by the firm member who generates the document

Outputs a table with the following information for each note:

Date	Author	Document	Title	Text

Time_Entries

[[File.Time_Entries]]	Time entries on the file chosen
[[Firm.Time_Entries]]	All time entries accessible by the firm member who generates the document
[[My.Time_Entries]]	Time entries on which the firm member who generates the document is the timekeeper
[[File.My_Time_Entries]]	Time entries on the file chosen, on which the firm member who generates the document is the timekeeper

Outputs a table with the following information for each time entry:

Date	Activity_Code	Task_Code	Description	Duration	Amount	Billing_Status	(Timekeeper)	(File)

- File is not output from [[File.Time_Entries]] or [[File.My_Time_Entries]].
- Timekeeper is not output from [[My.Time_Entries]].

Expenses

[[File.Expenses]]	Expenses on the file chosen
[[Firm.Expenses]]	All expenses accessible by the firm member who generates the document
[[My.Expenses]]	Expenses expensed by the firm member who generates the document

Outputs a table with the following information for each expense:

Date	Expense_Code	Description	Quantity	Unit_Price	Amount	(File)	(Expensed_By)

- File is not output from [[File.Expenses]]
- Expensed_By is not output from [[My.Expenses]].

Bills

[[File.Bills]]	Bills on the file chosen
[[My.Bills]]	Bills entered by the firm member who generates the document

Outputs a table with the following information for each final and draft bill.

Date	Invoice_Number	Total_New_Charges

Payments

[[File.Payments]]	Payments on bills on the file chosen
[[My.Payments]]	Payments entered by the firm member who generates the document

Outputs a table with the following information for each payment:

Date	*Payment for* File	*from* Client	Description	Amount

Amicus Small Firm variables conversion

[For Amicus Editor templates only.]

If you upload a document template created in Amicus Small Firm (in .docx format) to the Amicus Editor, any variables that correspond directly to Amicus Cloud variables are automatically converted. E.g., "@FileResponsibleLawyer" becomes "[[File.Responsible_Lawyer_Name]]". All other syntax and variables (including Custom Information variables) are left as is, unconverted. To complete the conversion, edit the template further as appropriate, and check that the generated results are as expected.

File variables

Small Firm	Amicus Cloud
FileShortFileName	File.Name
FileDateOpened	File.Open_Date
FileDateClosed	File.Close_Date
FileType	File.Type
FileClientName	File.PrimaryClient.Name
FileMatterName	FileMatterName
FileSummary	File.Summary
FileClientID	File.Client_ID
FileMatterID	File.Matter_ID
FileBillingRate	File.Billing_Rate_Name
FileSource	File.Referral_Source
FileResponsibleLawyer	File.Responsible_Lawyer_Name
FileAppointments	File.Appointments
FileTodos	File.Tasks
FileTimeEntries	File.Time_Entries
FilePhoneLogs	File.Phone_Calls
FileDocuments	File.Documents
FileMyAppointments	File.My_Appointments
FileMyTodos	File.My_Tasks
FileMyPhoneLogs	File.My_Phone_Calls
FileMyTimeEntries	File.My_Time_Entries

Contact variables

Small Firm	Amicus Cloud
ContactName	Contact.Name
ContactFirstName	Contact.First_Name
ContactMiddleName	Contact.Middle_Name
ContactSurname	Contact.Last_Name
ContactPrefix	Contact.Prefix
ContactCompanyName	Contact.Company_Name
ContactAddress	Contact.Mailing_Address
ContactPhoneNo	Contact.Business_Phone
ContactEmail	Contact.Email1
ContactTitle	Contact.Job_Title
ContactStreet	Contact.Business_Address_Street
ContactCity	Contact.Business_Address_City
ContactState	Contact.Business_Address_State
ContactCountry	Contact.Business_Address_Country
ContactZip	Contact.Business_Address_ZIP
ContactBusinessStreet	Contact.Business_Address_Street
ContactBusinessCity	Contact.Business_Address_City
ContactBusinessState	Contact.Business_Address_State
ContactBusinessCountry	Contact.Business_Address_Country
ContactBusinessZip	Contact.Business_Address_ZIP
ContactHomeStreet	Contact.Home_Address_Street
ContactHomeCity	Contact.Home_Address_City
ContactHomeState	Contact.Home_Address_State
ContactHomeCountry	Contact.Home_Address_Country
ContactHomeZip	Contact.Home_Address_ZIP
ContactOtherStreet	Contact.Other_Address_Street

Small Firm	Amicus Cloud
ContactOtherCity	Contact.Other_Address_City
ContactOtherState	Contact.Other_Address_State
ContactOtherCountry	Contact.Other_Address_Country
ContactOtherZip	Contact.Other_Address_ZIP
ContactNotes	Contact.Main_Note
ContactRole	Contact.Role
ContactIsCorp	Contact.Is_Company
ContactBusinessPhone	Contact.Business_Phone
ContactHomePhone	Contact.Home_Phone
ContactMobilePhone	Contact.Mobile_Phone
ContactBusinessFaxNo	Contact.Business_Fax
ContactHomeEmail	Contact.Email2
ContactOtherEmail	Contact.Email3

Primary Client variables

Small Firm	Amicus Cloud
People1Prefix	File.Primary_Client.Prefix
People1Title	File.Primary_Client.Title
People1FirstName	File.Primary_Client.First_Name
People1MiddleName	File.Primary_Client.Middle_Name
People1Surname	File.Primary_Client.Last_Name
People1CompanyName	File.Primary_Client.Company_Name
People1Address	File.Primary_Client.Mailing_Address
People1PhoneNo	File.Primary_Client.Business_Phone
People1FaxNo	File.Primary_Client.Business_Fax
People1Role	File.Primary_Client.Role
People1IsCorp	File.Primary_Client.Is_Company

My variables

Small Firm	Amicus Cloud
LawyerName	My.Name
LawyerFirstName	My.First_Name
LawyerMiddleName	My.Middle_Name
LawyerLastName	My.Last_Name
LawyerEmail	My.Email
LawyerID	My.Timekeeper_ID
WriterName	My.Name

Firm variables

Small Firm	Amicus Cloud
FirmName	Firm.Name
FirmAddress	Firm.Address
FirmPhoneNo	Firm.Phone

System variables

Small Firm	Amicus Cloud
TodayDate	Today

Glossary

Category, primary	Portion of a variable's name that indicates an area of Amicus data. Sometimes called a *record set*. The primary categories are: File, Contact, Firm, and My.
Category, secondary	Portion of a variable's name that indicates a subcategory of Amicus data. Only some variables have a secondary category. E.g., in "File.Primary_Client.Name", "Primary_Client" is a secondary category under the primary category "File".
Command	Special statement that defines settings for the document, or specifies which Amicus fields under which conditions should supply what information. Commands add "intelligence" to your templates.
COMMENT command	Lets you include descriptions and remarks in the template that aren't included in the output.
Document assembly	Feature that allows you to easily generate new documents and emails from a common *template* which contains standard, unchanging text as well as variable information that's supplied by client, file, firm member, or firm data.
EMAILSUBJECT command	Tells document assembly to include the output from a specified template in the subject of generated emails.
FOOTER command	Tells document assembly to include the output from a specified template at the bottom of every page.
HEADER command	Tells document assembly to include the output from a specified template at the top of every page starting with page 2, or optionally on every page.
IF command	Tells document assembly that if a specified condition is met, then output as defined. E.g., if a non-zero balance is owing on the file, then output a phrase that requests payment. You can define an IF command to output much more than a short phrase, even a multi-paragraph section that includes several variables.
INSERT command	Tells document assembly to include the output from a specified template at this position. By using multiple INSERT commands, you can create a template that's assembled from a variety of boilerplate templates, such as a letterhead, a greeting, some common clauses or summaries, some standard text, and a signature block.
LOCALE command	Tells document assembly to output dates and numbers using a region's style.
PAGEORIENTATION command	Tells document assembly to output a particular page orientation (portrait or landscape).
PAGEMARGINS command	Tells document assembly to output particular page margins--top, bottom, left, and right.
PAGESIZE command	Tells document assembly to output a particular page size (letter, legal, A4, etc.).
REPEAT command	Type of command that controls how some list-type variables (such as people on the file) are output—that is, which variables are output for each item, how the list is formatted, and which set of items are included.

Template	A document blueprint designed with specific formatting and both variable and unchanging content, and then used over and over again to generate new documents and emails. Create templates via Amicus Editor within Amicus Cloud (or use a word processor or HTML editor and then upload your template to Amicus), or via the Amicus Cloud Office Add-in within Word. You can have Amicus Editor templates and Amicus Word templates, depending on where you prefer to edit each.
Variable	A placeholder that tells document assembly what data to retrieve from Amicus. A variable corresponds to a field in Amicus (or Exchange). The text output from a variable may change each time a template is run, depending on which particular file and/or contact you are generating the document for, and whether the data stored in Amicus has changed.
Variable, list-type	Type of variable that outputs information about multiple items—e.g., each of the contacts on a file, or each of the appointments with a contact.

January 2020