



This guide will walk you through the basic template creation skills you need to get started with Lawyaw. Click the  icons throughout the guide for additional resources.

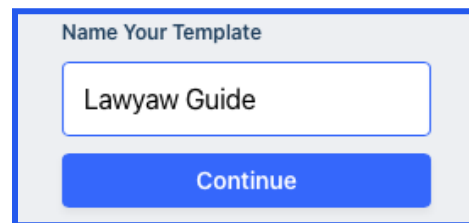
Let's begin preparing a template using this guide as your template document.

A. INSTALL AND OPEN THE **LAWYAW TEMPLATE BUILDER ADD-IN**.

1. Click the "Insert" tab in the top left.
2. Click "Get Add-ins" under the Add-ins section.
3. Click "Store" in the office Add-ins popup window.
4. Search for "Lawyaw" in the search bar.
5. Select "add" and then "Continue." The template builder will appear automatically in your "Home" tab.
6. Click to open the Lawyaw Template Builder Add-in and log in.

B. NAME YOUR TEMPLATE TO GET STARTED.

- ☐ Let's use this Guide as your first template. Give it a name like "Lawyaw Guide" and click [Continue](#).
- ☐ Click [Start from scratch](#).



Note: After generating your first template, you'll be given the option to "Import fields from existing templates" instead of starting from scratch with each new template project.

C. CREATE A ROLE CARD AND ANOTHER CARD.



What's a **Card**, you ask? Think of it as a bucket containing a group of fields related to the same object or person. There are two different types of **Cards** used by Lawyaw, **Role Cards**, and **Other Cards**. Here's the difference:

Role Cards are used for grouping together information fields associated with people, companies, courts, etc.

Other Cards group information related anything else, e.g., case information, fee arrangements, divorce facts, etc.

For more info, click here:

- ☐ Create a Role card by clicking **+ New Card** in the top Right.

- ☐ Select **"Role"** and add a Card label. Let's call it **"Attorney"** and then click **Add Card** at the bottom Left.

- ☐ Create another **Role** Card and name it **"Opposing Counsel"**.

- ☐ Now let's create an **Other** card and name it **"Letter Information"** because it will contain various bits of information we need to generate the letter below.

- ☐ Create a second **Other** Card and name it **"Case Information"** because it will contain case-specific information we'll want to reuse across other documents.

Cool Tip:
When generating a document in the Platform, you can apply Lawyaw/Clio Contacts directly to a Role Card, this way there's no redundant data input required!

D. **ADD FIELDS TO YOUR CARDS.**

A **Field** is a placeholder reserved for a specific piece of information relating to the Card with which it is associated. For example, a Divorce Attorney might create an **Other Card**



called "Divorce Information" that contains Fields needed in a divorce case, e.g., Date of Separation, Ground for Divorce, etc.

- ☐ In the [Attorney](#) card, click [+ Add field to card](#) and create a [Short Text](#) field named "[Law Firm Name](#)".
- ☐ In the [Letter Information](#) card, click the [+ Add field to card](#) and create a [Multiple Choice](#) field named "[Delivery Method](#)". Then click [+ Add option](#). In the [Option label](#) text box, type "USPS" and do the same in the [Text to merge](#) text box. Repeat for "Email", "Hand Delivery", and "FedEx". Click [Add Field](#).
- ☐ In the [Case Information](#) card, add a [Date](#) Field named "[Hearing Date](#)".
- ☐ In the [Case Information](#) card, create a [Short Text](#) field called "[Case Number](#)" and another [Short Text](#) field called "[Case Title](#)".

E. [INSERT FIELDS INTO YOUR TEMPLATE.](#)

Now we're going to start inserting our fields into the letter example below. Woohoo! 🎉 There are three ways you can insert fields into a template: (1) [Bulk Insert](#), think find and replace; (2) point and click; and (3) highlight and click. Don't worry, we're going to try all three in the steps below 😊.

- ☐ There are three places in the letter we need to insert a field for [Attorney Full Name](#). Click the [button](#) next to the [Full Name](#) field in the [Attorney](#) card. Select [Bulk Insert](#) and enter "Attorney's Name" in the text field. Click [Find](#). Lawyaw finds that text and allows you to replace it with the [Attorney Full Name](#) field incrementally (1-by-1) or all at once.
- ☐ Insert [Attorney Email](#) by placing your cursor to the right of the appropriate text in the header and clicking the [+](#) on the Right side of the [Email](#) field within the [Attorney](#) card. Do the same for [Case Number](#) and [Opposing Counsel Email](#).
- ☐ Insert [Attorney Law Firm Name](#) by highlighting "Law Firm Name" with your cursor in the header below then click the [+](#) on the Right side of the [Law Firm Name](#) in the [Attorney](#) card. Repeat for the remaining fields (highlighted).



[Law Firm Name](#)
[Attorney's Name](#)
[Address](#)
[City](#), [State](#) [Zip](#)
Email:



Honorable Judge Justice
Lawyaw District Court
San Francisco, CA 94121

**RE: Case Name
Case No.**

Honorable Judge Justice,

I'm purrfectly ready to proceed with the Hearing scheduled for Hearing Date. I'm here live. I'm not a cat. Opposing counsel, Opposing Counsel Full Name, said that he has no objection to proceeding in spite of my technical difficulties.

Best,

/s/ Attorney's Name
Attorney's Name

Sent via: Delivery Method to the following:

CC: Opposing Counsel Full Name
Email:

F. **SAVE YOUR TEMPLATE**

- ☐ Once you've finished inserting fields, click [Save template](#) in the bottom-Right of the Template Builder. Choose [Save existing template](#) and click [Update](#).

 YOU JUST CREATED YOUR FIRST TEMPLATE! 

G. **DRAFT YOUR FIRST DOCUMENT.**

- ☐ Head over to the Platform by [clicking here](#). Refresh the webpage and the locate the [Word Templates](#) tab in your Lawyaw [Library](#). Refresh your page to make sure you have the most updated template version.



- ☐ Find your template in the list and click the [Actions](#) button and then [Draft New Document](#). Give the document a title, choose or create a Matter, and click [Next](#).
- ☐ Fill out all the required fields. Remember, [Role Cards](#) allow you to attach Contacts for to easily populate pre-existing Lawyaw/Clio information.
- ☐ Click [Generate Documents](#).

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