## **WELCOME TO LAWYAW!**



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.

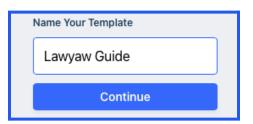


- 1. Click the "Insert" tab in the top left.
- 2. Click "Get Add-ins" under the Add-ins section.
- 3. Click "Store" in the office Add-ins popup window.
- 4. Search for "Lawyaw" in the search bar.
- 5. Select "add" and then "Continue." The template builder will appear automatically in your "Home" tab.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



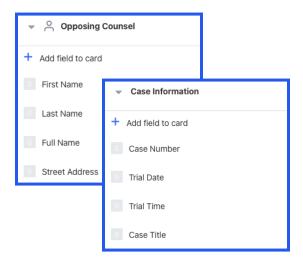
Note: After generating your first template, you'll be given the option to "Import fields from existing templates" instead of starting from scratch with each new template project.

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.

#### 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!

- ☐ 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.

### 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,

<u>/s/ <mark>Attorney's Name</mark></u> <mark>Attorney's Name</mark>

Sent via: Delivery Method to the following:

CC: Opposing Counsel Full Name Email:

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- 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 <u>clicking here</u>. 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.

# **WANT MORE SUPPORT?**







