

FILE OR CONTACT LISTS – PROBLEMS WITH LIST TEMPLATES

There are four Word templates that come with Amicus Attorney that list Files or Contacts in a table – if you try to use the templates right out of the box, the following two problems will continue until the templates are modified: You select any number of Files or Contacts, run any of the reports, and a) half the number of Files or Contacts will be listed on the report; and/or b) your final document displays each File or Contact on a separate page (with a header for each record), similar to the screen shot below.

All Contacts by File			
<i>This report was prepared on June 28, 2005 by Lori Berenson.</i>			
Filename	Name	Role on File	Address
Jones, Michael - Bankruptcy	Jones, Michael	Client	1400 Detroit Rd., Suite 115 Rocky River, OH 44116
Section Break (Next Page)			
All Contacts by File			
<i>This report was prepared on June 28, 2005 by Lori Berenson.</i>			
Filename	Name	Role on File	Address
Stewart, Louis - Will	Stewart, Louis	Client	1313 W. 6th Street, #200 Cleveland, OH 44113

These problems may also occur if you have created a new template based on one of these existing Word templates, or if you modify the original templates and add a new column at the end of the table.

The problem templates are listed below:

- Files Index – by client ID (MS Word) – x002fcl.dot
- Files Index (MS Word) – x002fft.dot
- Contacts by File (MS Word) – x002cft.dot
- Contact Index – Address & Phone (MS Word) – x002cap.dot

There are two steps that may need to be performed in these templates to resolve these issues, and they are listed below. Both of these steps can be followed without harming the initial template.

1. Edit the existing template

- Select File – Master Documents, locate the group and document to be modified, double-click on the name of the document, and click on Edit Master Document.
- Click on ‘Enable Macros’ to open the template.
- Select ‘Tools’ – ‘Macro’ – ‘Macros’
- Scroll down until you see the macro ‘AmicusMerge.MAIN’ and click on **Edit**

- The last line labelled ‘Application.Run’ under the section Public Sub MAIN() – shows the template name as “prjAmicus.AAMerge.MAIN” (see the screen shot to the right) – the proper template name should be the actual name of the template, e.g., the template x002fcl.dot would be listed as “prjAmicus.x002fcl.MAIN”.

```
Public Sub MAIN()
    Dim sMergePath As String
    Dim sTitle As String

    sTitle = "Amicus Merge"

    On Error GoTo error_trap
    sMergePath = Trim(System.PrivateProfileString('
If (Right(sMergePath, 1) <> "\") Then
    sMergePath = sMergePath + "\"
End If

AddIns.Add sMergePath + "Amicus.dot"
Application.Run "prjAmicus.AAMerge.MAIN"
End
```

- You will see the name of the template on the title bar of the Microsoft Visual Basic window

- f. Select the text 'AAMerge' and replace it with the proper template name, as shown to the right:
- g. Click on the **Save** button and click on **X** to close the VB window.

```
Public Sub MAIN()
    Dim sMergePath As String
    Dim sTitle As String

    sTitle = "Amicus Merge"

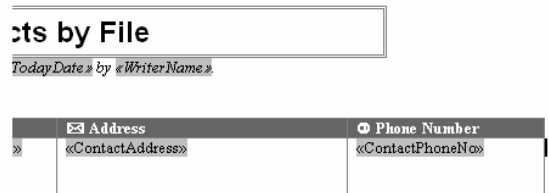
    On Error GoTo error_trap
    sMergePath = Trim(System.PrivateProfileString("",
    If (Right(sMergePath, 1) <> "\") Then
        sMergePath = sMergePath + "\"
    End If

    AddIns.Add sMergePath + "Amicus.dot"
    Application.Run "prjAmicus.x002cap.MAIN"
End
```

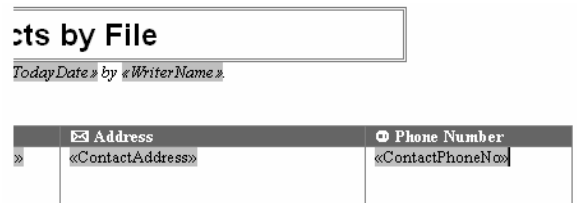
2. ExtendSelection Bookmark

- a. The ExtendSelection bookmark must be at the end of the last field in the table row.
- b. Select 'Edit' – 'GoTo' 'Bookmark', select 'ExtendSelection', and click on 'GoTo'. You can then close the Find & Replace window.

- c. If you see that the I-beam is outside of the table, or in any location other than after the last field in the table (as shown to the right), you will need to add a new bookmark in the correct location.



- d. Click inside the table, immediately following the last field. Select 'Insert' – 'Bookmark', select 'ExtendSelection', and click on the **Add** button. You will now see the black I-beam in the proper location (as shown to the right).



- e. Close and save the Word template.

If you are not comfortable modifying these templates, you can download a zipped file from our website that contains the modified version of all four templates. Prior to unzipping and extracting the files, you may want to copy the existing files to a temporary location as a backup in the event that someone has modified the templates. The templates will be in the Team50\Template\Document folder.

1. Download the zipped file to a temporary location, and then double-click on the zipped file.
2. Extract the four files to the Team50\Template\Document folder – as long as you have not made any changes to the main templates, you can overwrite the existing files.

If problems occur while manually modifying the templates, you can always copy the original templates (from your temporary location, or from the original Amicus CD) back to the Team50\Template\Document folder.

If you download the zipped file from our website, please keep in mind that two other minor modifications have been made to the four templates, as follows – a) the header row in the table has been designated as a header row, and it will repeat at the top of each subsequent page, and b) the entire table has been modified so that the rows do not break across pages; therefore, if a record with multiple lines is at the bottom of a page, it will not be split across 2 pages.