



HOTDOCS

for LEGAL PROFESSIONALS

Covering HotDocs
Version 11



HOTDOCS

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

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The materials in this book were written using HotDocs Classic 11.2.8 and all steps and instructions were tested prior to the publication date. As HotDocs Classic continues to be updated, your software experience may vary slightly from what is seen in this manual.

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MEET OUR TEAM OF HOTDOCS EXPERTS

Meet our team of HotDocs experts who have co-authored this manual.



BARRON HENLEY

Most people wouldn't relish the idea of spending a day coding complex documents. Barron is not most people. There are few things Barron enjoys more than spending an afternoon automating documents. Barron has helped hundreds of organizations automate the document drafting process, helping them improve efficiency and reduce errors.

Barron's passion for HotDocs and Microsoft Word go hand-in-hand. Barron doesn't just write the code, he also formats the documents perfectly to ensure that the formatting works correctly every time.

As an attorney, he understands how challenging it is to practice law without quality templates. When Barron isn't coding complex documents, he focuses on training people on Microsoft Word and teaching CLE classes for attorneys across North America.

JOHN FEDERICO

With a drive to make software bend to his will, John pushes the limits of what HotDocs can do with complex coding. He's passionate about creating a simple user interface, reducing the amount of data entry required to generate complex documents. His experience practicing law taught him the value of improving document drafting efficiency.

When John isn't working in HotDocs directly, he focuses on getting most out of Microsoft Word's native capabilities using complex macros and custom ribbons. Never one to back down from a challenge, John will find a way to make anything happen.



DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.



HOTDOCS FOR COMPLEX LEGAL DOCUMENTS

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10 TEXT VARIABLES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

WHEN TO USE TEXT VARIABLES

Text variables can include any character on the keyboard. Use them if you don't want to give the user a set of choices or options. If you want to present the user with a list of possible answers to choose from, then a multiple choice, true/false or computation variable may be more appropriate (more on those later).

If You're Merging Numbers Instead of Text

Text variables should also be used to merge numbers that serve as identifiers and which cannot be used in a mathematical calculation (social security numbers, phone numbers, zip codes, etc.). Ask yourself if the number in question could possibly be used in a mathematical calculation. If it could not, then you should use a text variable instead of a number variable. For example, social security numbers, phone numbers, zip codes and tax ID numbers should all be text variables and not number variables even though they are comprised exclusively of numbers.

TEXT VARIABLE OPTIONS

When you create a Text variable, you can decide how the text will be formatted when it is merged into the assembled document. You can also add a prompt to help the user know how to answer the question and add a help "Resource" or select other advanced options that determine how the variable will be processed.

Editing the Properties of a Text Variable

Select the text or blank that you'd like to replace with a Text Variable and insert a text variable as described previously. Now click the Edit Component button.

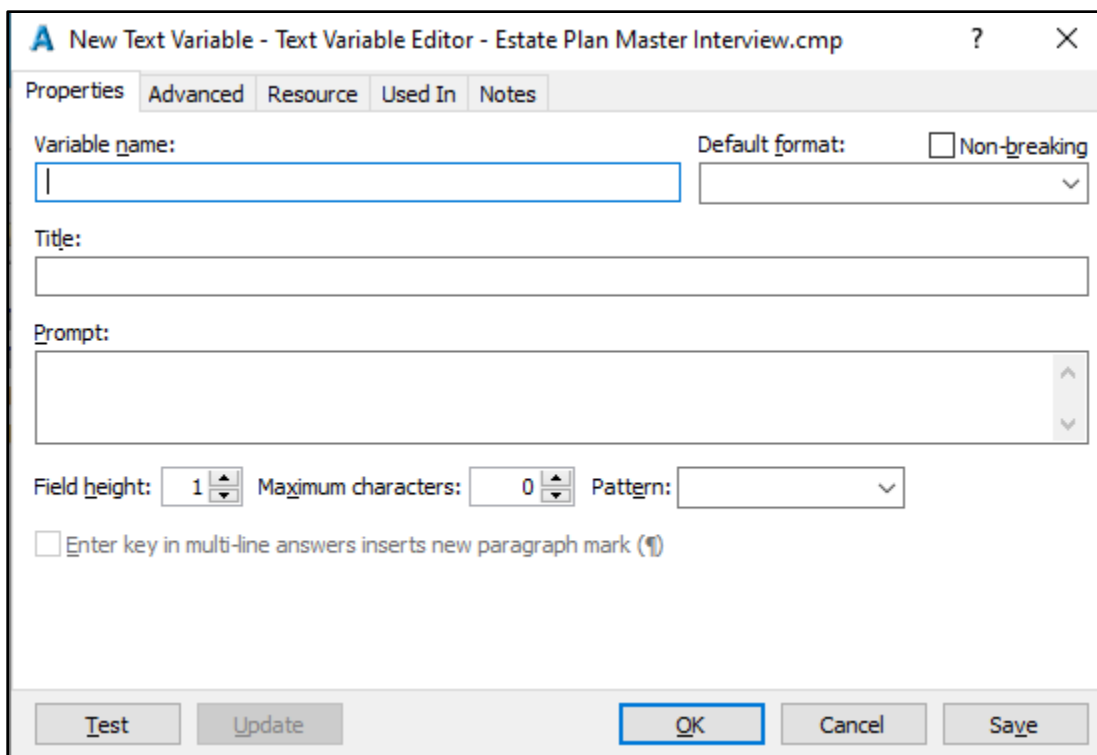



FIGURE 10-1

The following is a description of the properties of a Text Variable that you can edit.

To	Do This
Specify a default format that will be applied to all instances of the variable (you'll be able to change from the default any time you insert the variable)	Select a format from the Default format drop-down list. If your variable will hold a name, see TIP - Formatting Names below. Optionally, to keep the answer from breaking across lines in the document, select Nonbreaking .
Provide users with additional information about the variable	Type a prompt (question) in the Prompt box. This information replaces the Variable name when the variable is presented during assembly.
Specify an alternate name for the variable	Enter a title in the Title box (this will appear in the interview)
Control what type of information a user types and format it as they type	Select a pattern from the Pattern drop-down list. If you don't see the one you need, you can make your own - see TIP - Custom Patterns below. NOTE: This features is not supported in HotDocs Online
Control the number of characters allowed in the answer	Either type a value in the Maximum characters box, or click the up or down arrows to select a value (up to 15,000 characters). Leaving this field blank defaults it to 15,000 characters.
Control how an answer is merged in a Word document when the user presses Enter in a multi-line answer field. The type of answer required determines which break should be used. For example, if the user must enter separate paragraphs of text, HotDocs should merge a paragraph break (¶). However, if the user must enter	Select Enter key in multi-line answers inserts new paragraph mark (¶).

separate lines in a single paragraph (such as lines in an address), HotDocs should insert a line break (↵).	
Change the height of the answer field that appears during assembly	Either type the number of answer field lines (up to 12) in the Field height box, or click the up or down arrows to select a number. This will give the user a visual clue that it's okay to hit hard returns and/or enter more than one line of text. It obviously also makes it easier for the user to see what they've already typed.
Provide users with helpful information that can assist them in providing the correct answer	Click the Resource tab and provide a Resource option. By typing in the "Text" blank within the Resource Tab, it will add a  button to the right of the variable. If the user clicks it, they'll see the help text you provided. For purposes of this class, just stick with Plain Text in the Resource Type.
Find out which dialog is used to display a variable	Click the Asked In tab.

TIP - Formatting Names

If you're creating a name variable, be wary of using the "Like This" format example. If you enter a name like "McDonald," the "Like This" format will insert "Mcdonald" into the document. Therefore, if you want a name entered in lower case, we recommend that you leave the format blank and notify the user in the prompt (see below) how you would like the name entered.

TIP - Custom Patterns

NOTE: This feature is not supported in HotDocs Online. You can create your own pattern by typing it in the Pattern box. Use the following codes to create patterns:

Custom Patterns:

Code	HotDocs Meaning
X	any character
9	any numeric character
A	any alphabetic character
U	uppercase alphabetic character
L	lowercase alphabetic character
N	alphanumeric character (9 and A)
H	hexadecimal character (0-9, A-F, a-f)

You can also insert hyphens, periods, static text, etc. within these codes. To insert the foregoing characters as static text and not codes, enter a forward slash (/) and then the character. Note, this also applies to the forward slash character itself (i.e., to enter a slash as static text, you must enter // into the pattern).

EXERCISES

Example 1:

Original sentence:

The client's name is John A. Doe.

After coding:

The client's name is «Client Name First» «Client Name Middle» «Client Name Last».

NOTES: In order to create maximum flexibility with the variables you create in your template, it is recommended that you create separate variables for first, middle and last name. In this manner, you could use the same variables in a letter in which the recipient was addressed:

Dear «Client Name First»:

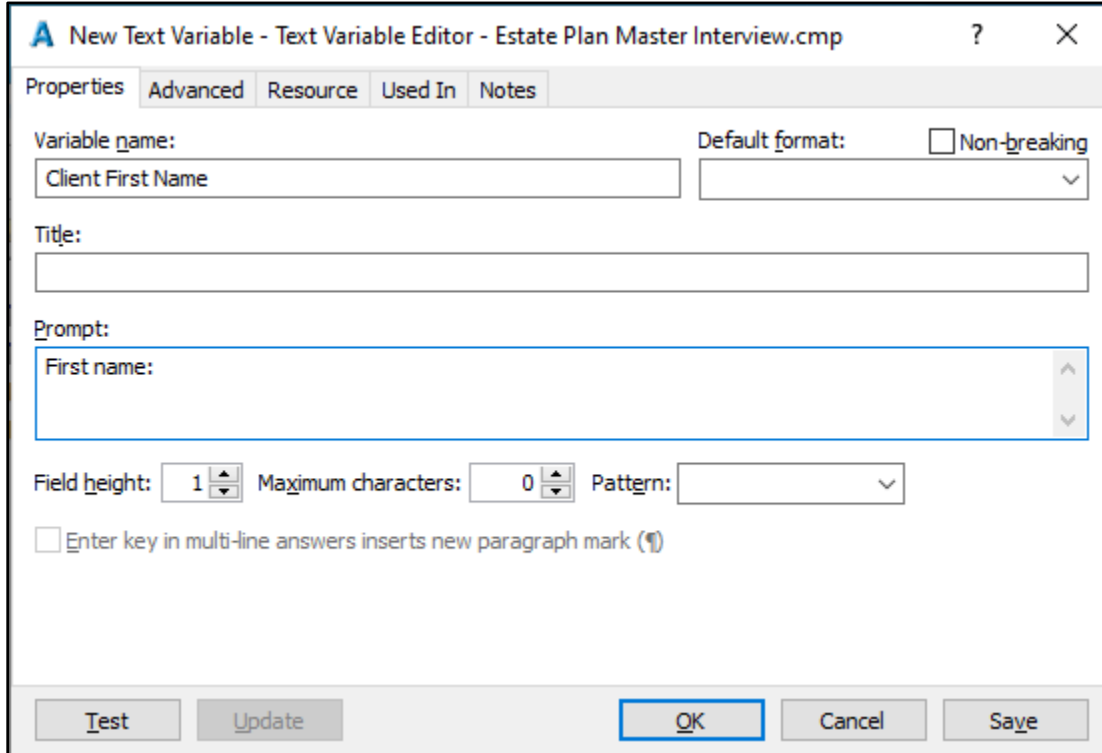


FIGURE 10-2

Example 2:

Original sentence:

John A. Doe's social security number is 555-55-5555 and his phone number is (614) 555-5555.

After coding:

John A. Doe's social security number is «Client SSN» and his phone number is «Client Phone Number».

NOTES: The key here is to use the Pattern. This not only prevents the user from entering letters, but it also saves two keystrokes since the hyphens are automatically inserted with the pattern.

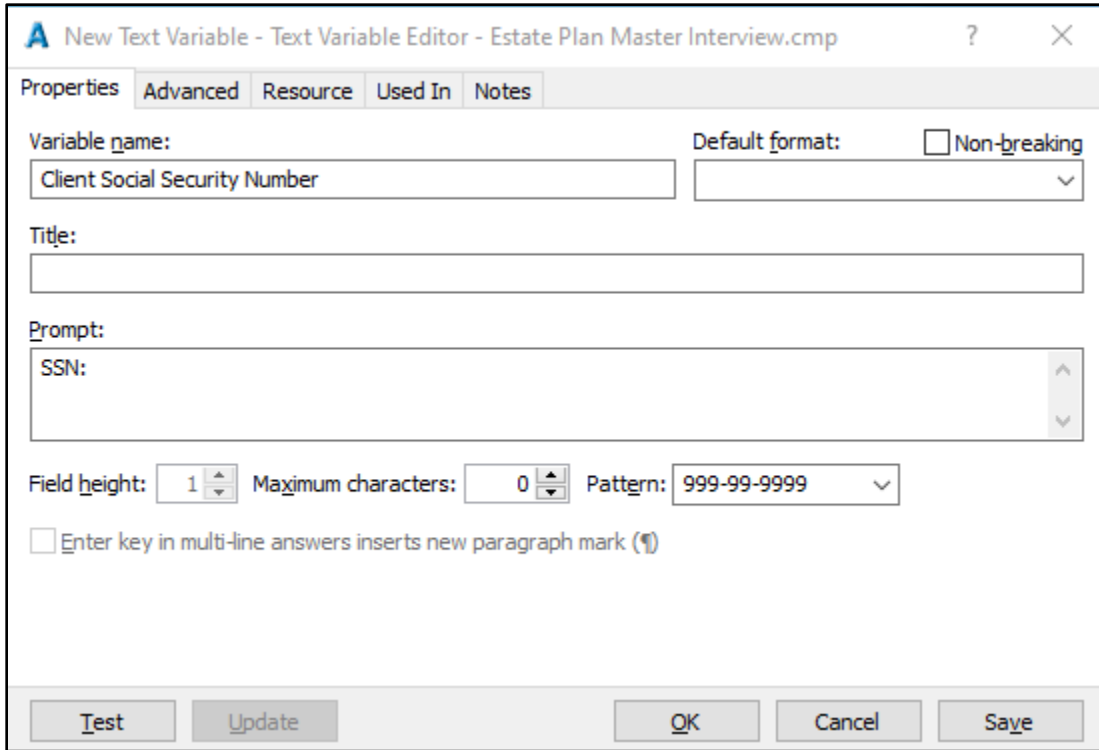


FIGURE 10-3

Example 3:

Original sentence:

The billing matter number is ASX-44221.

After coding:

The billing matter number is «Client Billing Matter Number».

NOTES: In this example, we're creating a custom pattern using the codes set forth above. Since this pattern consists of three letter and five numbers, it looks like this: UUU-99999. When using a custom pattern, it's advisable to give the user an example of what they're supposed to enter in the prompt.

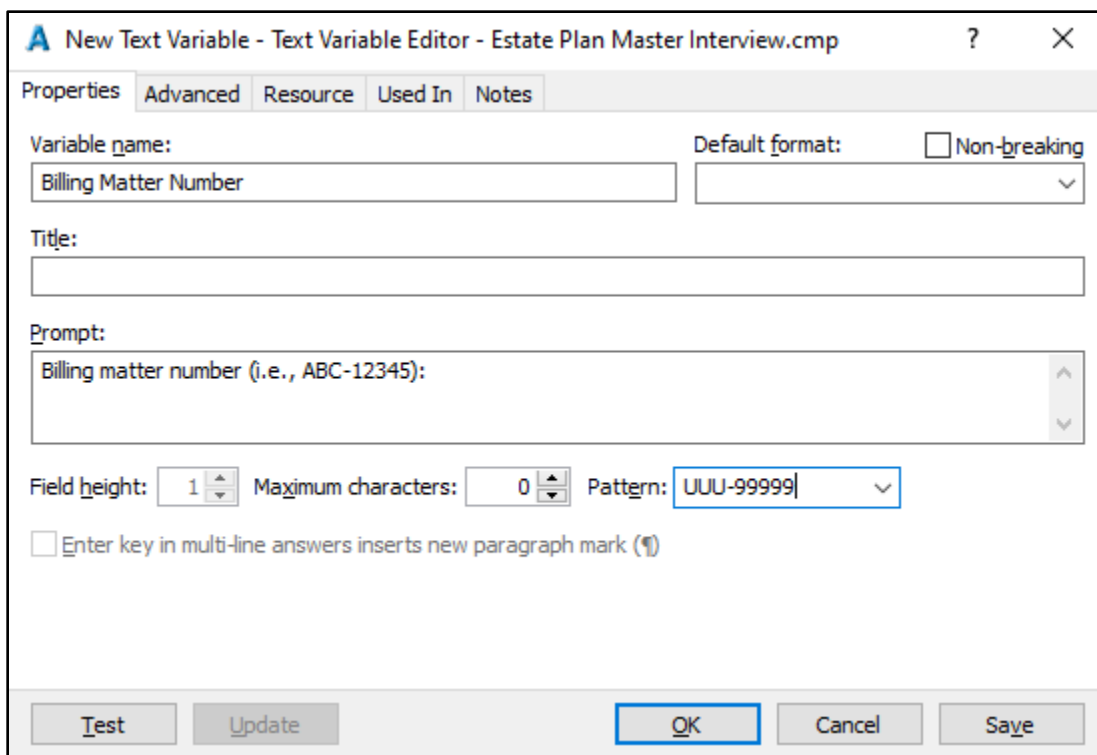


FIGURE 10-4

Example 4:

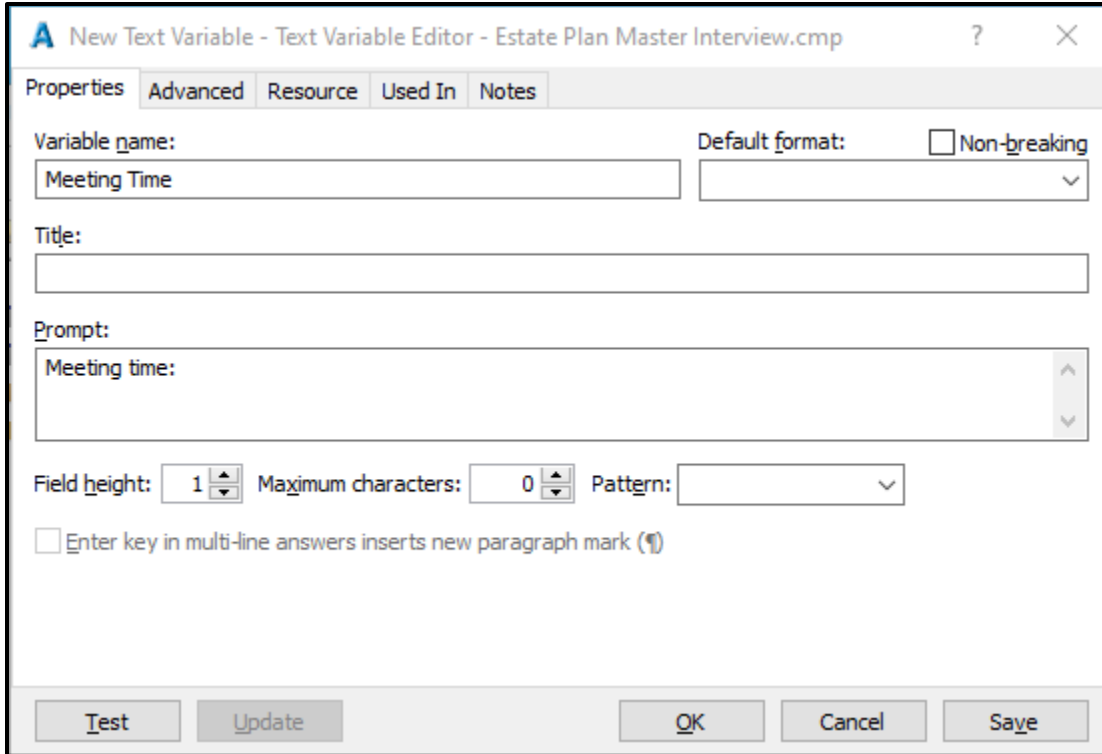
Original sentence:

The meeting will occur tomorrow at 8:30 AM.

After coding:

The meeting will occur tomorrow at «Meeting Time».

NOTES: The custom pattern for showing time is 99:99 am and it must be typed exactly in that manner for it to work.



New Text Variable - Text Variable Editor - Estate Plan Master Interview.cmp

Properties | Advanced | Resource | Used In | Notes

Variable name: Meeting Time

Default format: Non-breaking

Title:

Prompt: Meeting time:

Field height: 1 | Maximum characters: 0 | Pattern:

Enter key in multi-line answers inserts new paragraph mark (¶)

Test | Update | OK | Cancel | Save

FIGURE 10-5



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