

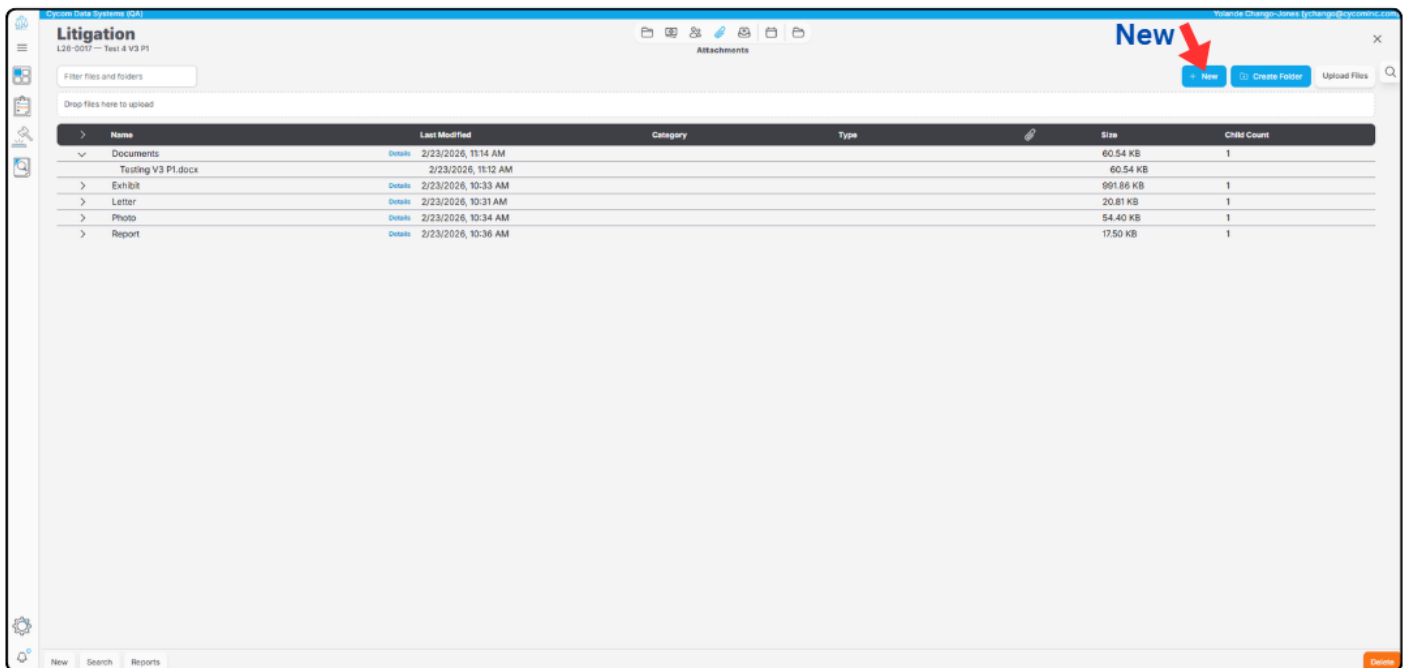
Creating a Matter Document from a Template

These notes are provided by **Cycom Data Systems, Inc.** to support the use of **CityLaw / CountyLaw Next Generation (CLNG)** and are intended to be used for review of general topics covered during training.

If you discover an error in this document, or if you encounter any problems performing any steps described, please contact **Cycom Support** at support@cycominc.com or by calling **888-292-6688**.

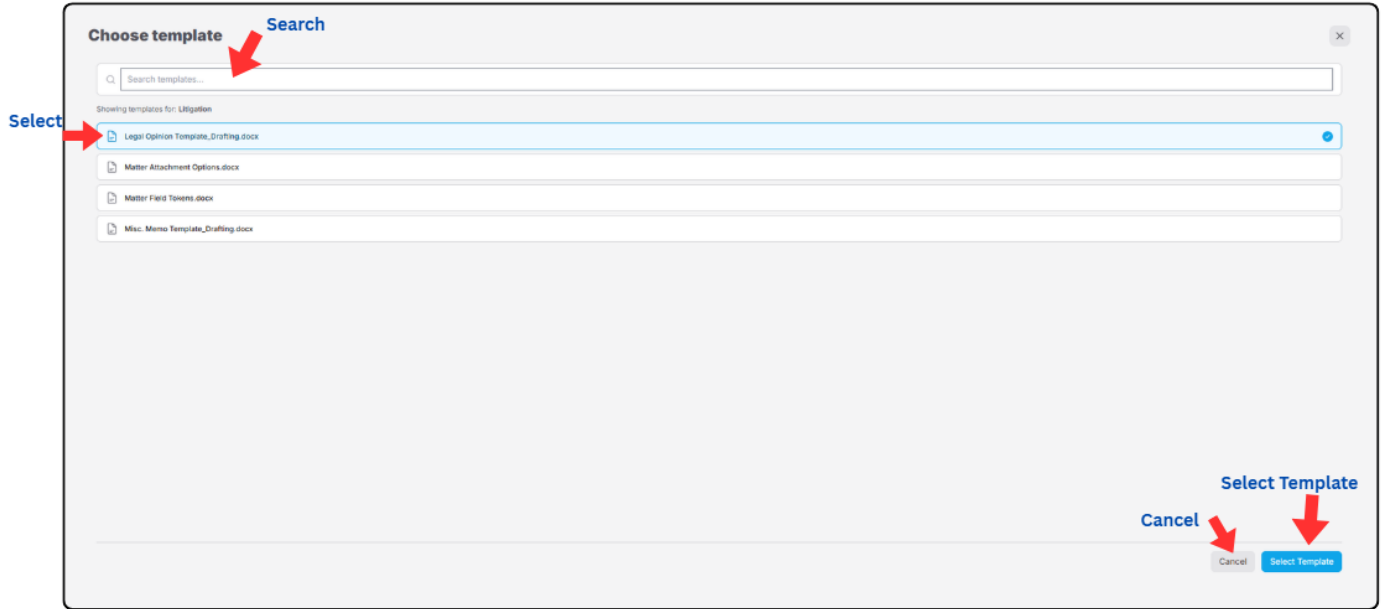
Create a Matter Document from a Template

Open the **Attachments** icon in the Module Toolbar while in the matter, click the blue **New** button to the top right of the screen.



A **Choose Template** card will open. You may **search** for a specific template or **select** it from the list provided by your systems administrator. Next, click **Select Template** or **Cancel** should you wish to return to your previous screen.

Creating a Matter Document from a Template



Choose template Search

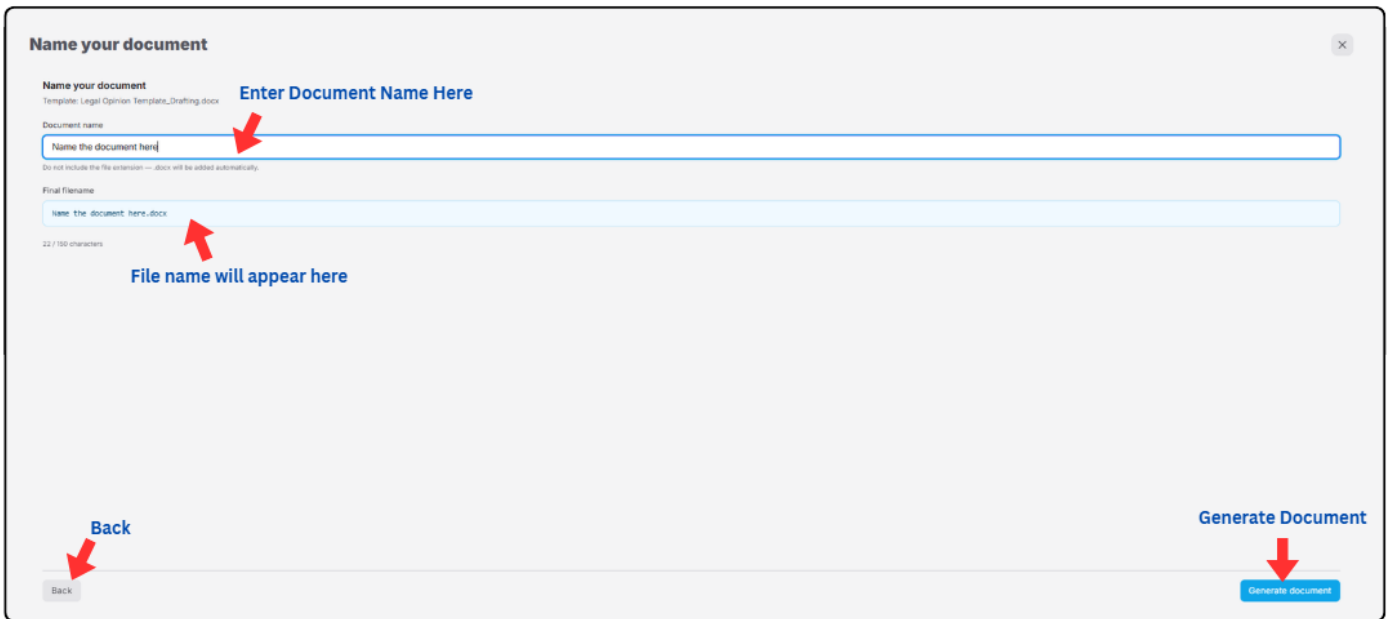
Search templates...

Showing templates for: Litigation

- Legal Opinion Template_Drafting.docx
- Matter Attachment Options.docx
- Matter Field Topics.docx
- Misc. Memo Template_Drafting.docx

Cancel Select Template

Next, a **Name your document** card will open. Enter a name for the document you wish to create, then click **Generate Document**. The **Back** button will return you to your previous screen.



Name your document

Template: Legal Opinion Template_Drafting.docx

Document name

Name the document here

Final filename

Name the document here.docx

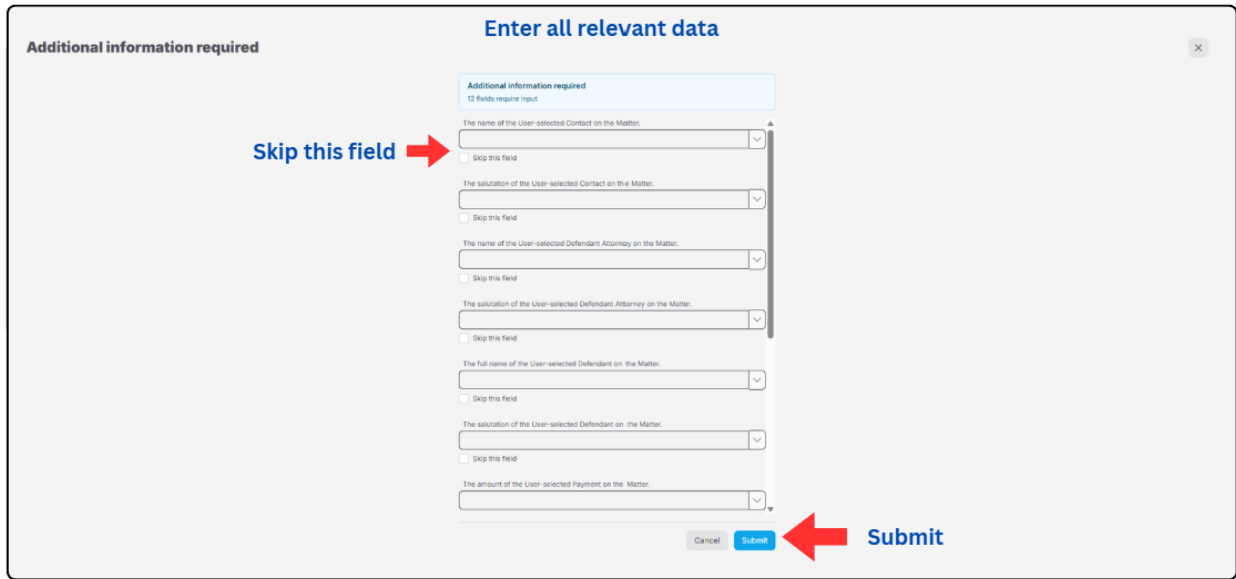
22 / 100 characters

File name will appear here

Back Generate Document

Creating a Matter Document from a Template

The **Additional information required** card will open. Enter the relevant data. Any field that does not apply, check the box **Skip this field**. When done, click **Submit**.



Additional information required

Enter all relevant data

Additional information required
12 fields require input

The name of the User-selected Contact on the Matter:
☐ Skip this field

The salutation of the User-selected Contact on the Matter:
☐ Skip this field

The name of the User-selected Defendant Attorney on the Matter:
☐ Skip this field

The salutation of the User-selected Defendant Attorney on the Matter:
☐ Skip this field

The full name of the User-selected Defendant on the Matter:
☐ Skip this field

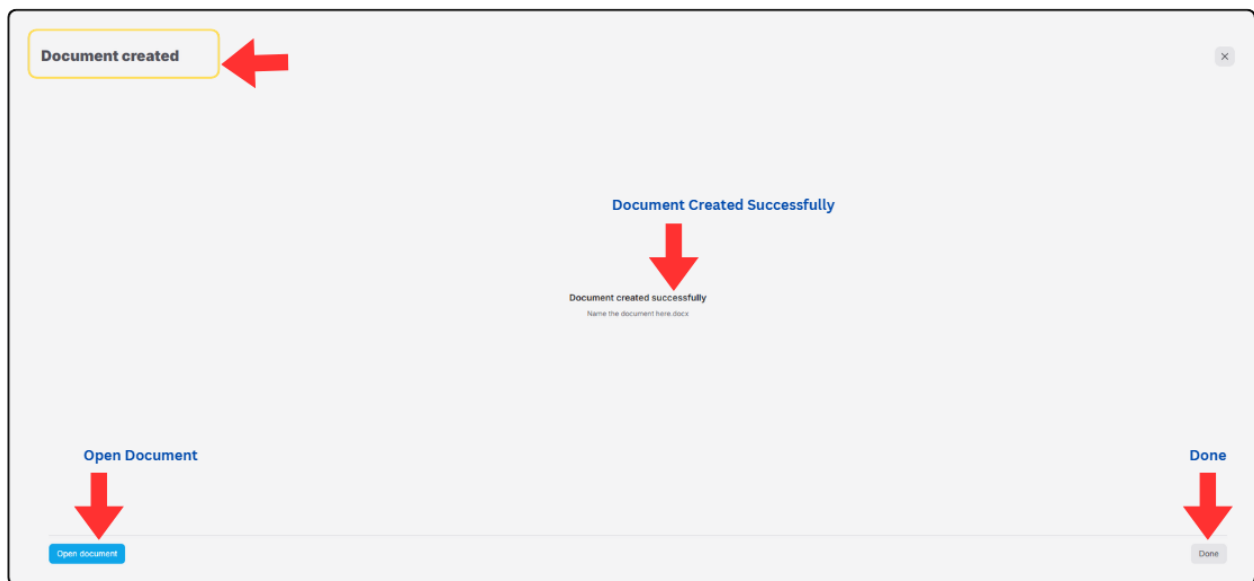
The salutation of the User-selected Defendant on the Matter:
☐ Skip this field

The amount of the User-selected Payment on the Matter:
☐ Skip this field

Cancel Submit

A Document Created Successfully notice will appear in a new card. Click **Open Document** to further work on it or **Done** button if you are finished.

The Document will open in a new Tab in Microsoft Word.



Document created

Document Created Successfully

Document created successfully
Name the document here.docx

Open Document Done