



CLNG – Create, Edit, and Delete Templates

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**.

contents:

- **Create Templates**
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- **Delete Templates**

Create Templates

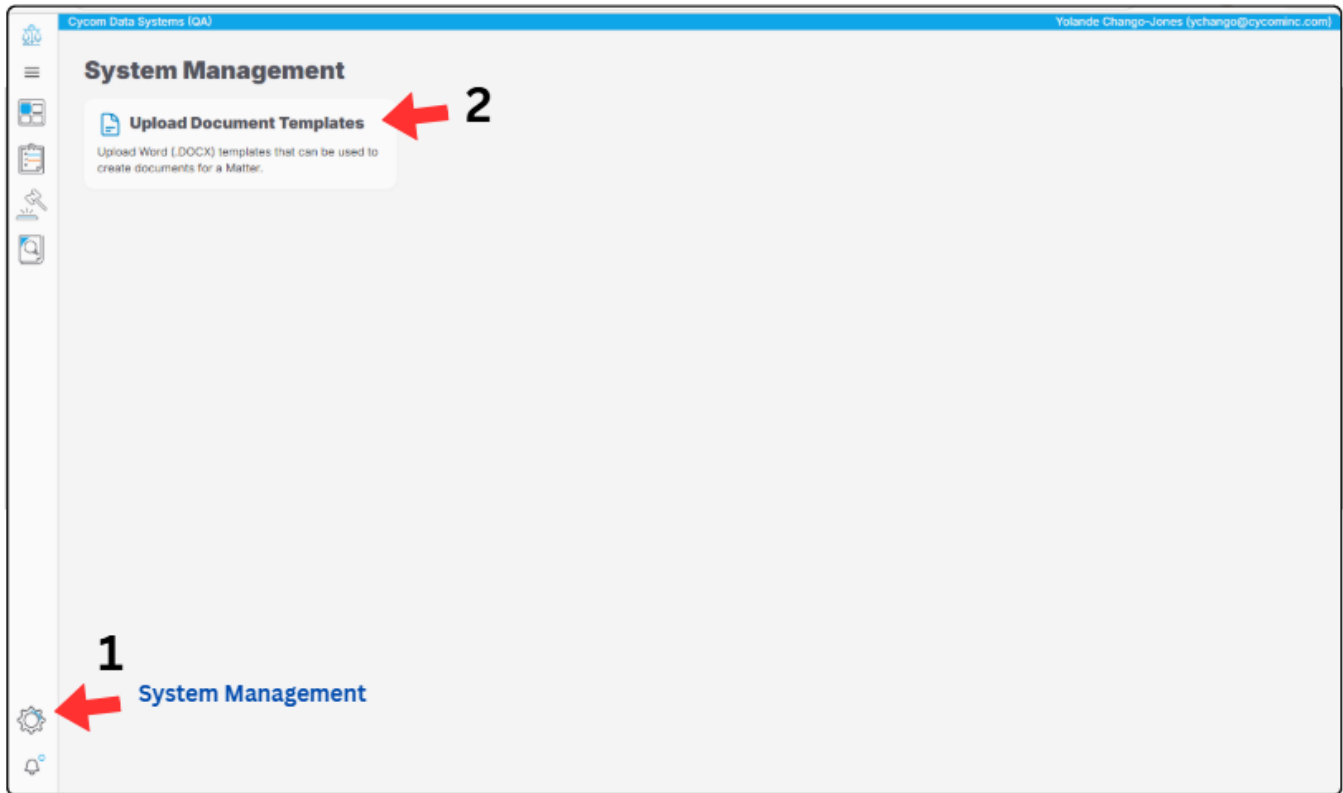
There are two options to create a template:

The first option:

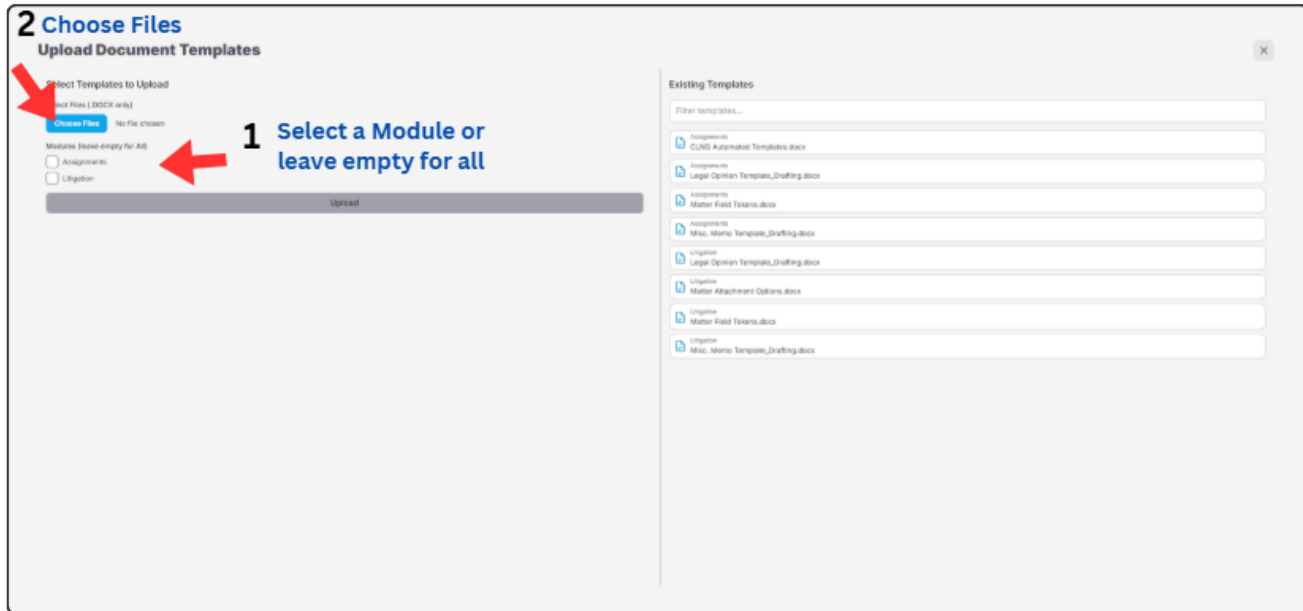
Go to your desktop and in Microsoft Word **create** a form letter/document **or open** an existing form letter/document. Enter the **CLNG Matter Field Tokens** from the list provided to the System Administrator into the document as needed by your office. Once the tokens are entered, your document is now a template. **Save the prepared Template as a .docx** document. Next, **open CLNG** and follow the **Upload Template** steps below.

The second option through Upload Template:

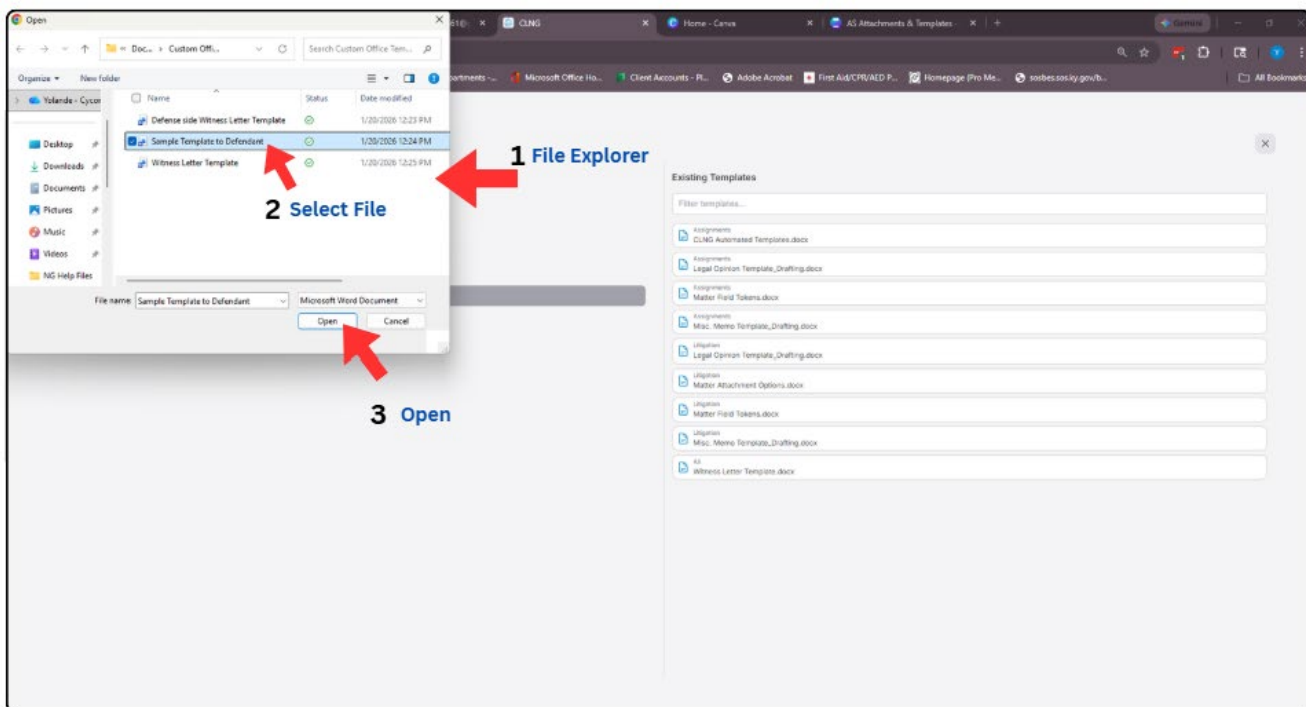
Go directly to **CLNG**, click the **System Management** icon (the **Gear** at the bottom of the Global Toolbar), then click **Upload Document Templates**. An **Upload Document Templates** card will open.



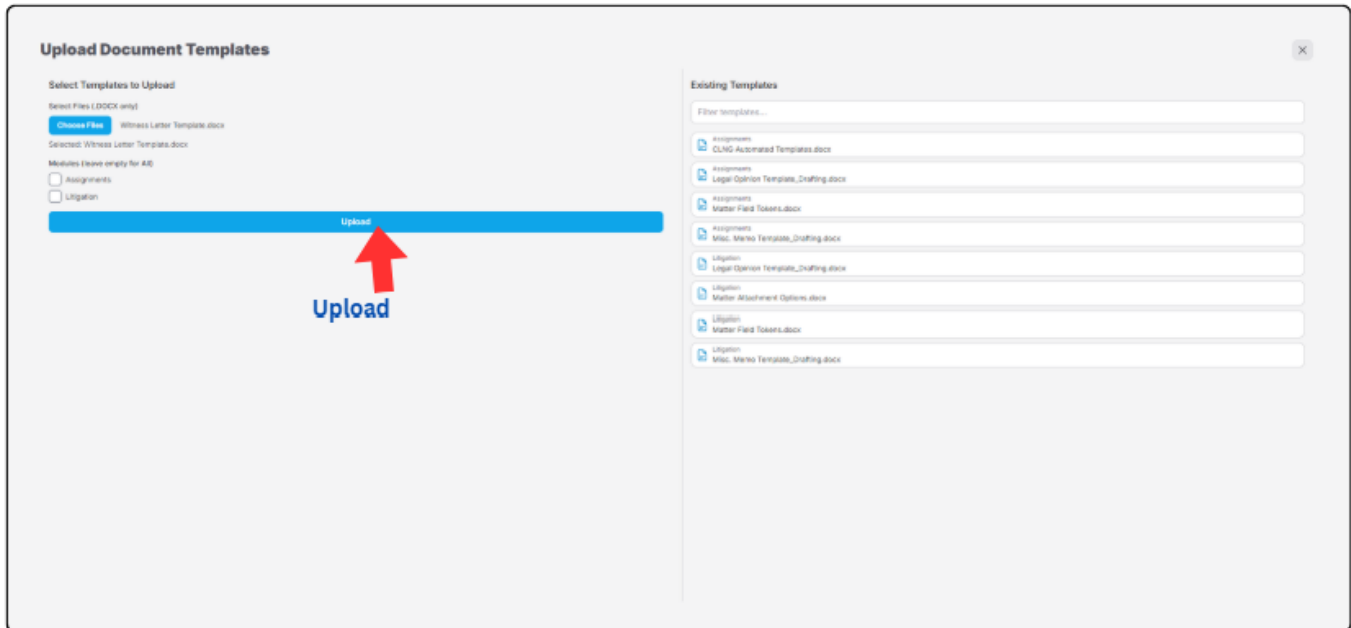
In **Upload Document Templates** view, select a module or leave empty for all to include it in all modules, click **Choose File**.



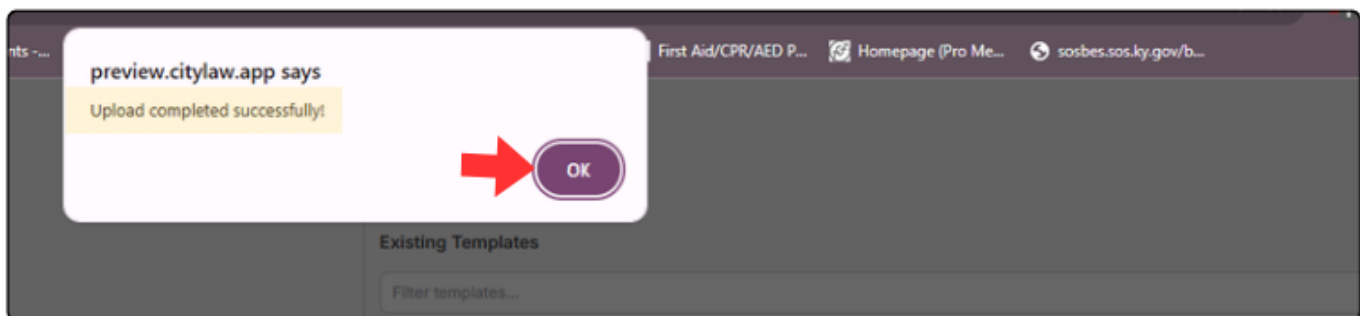
File Explorer window from your desktop will open. In File Explorer, **select the file/Document** you need (your standard form letter) then click **Open**.



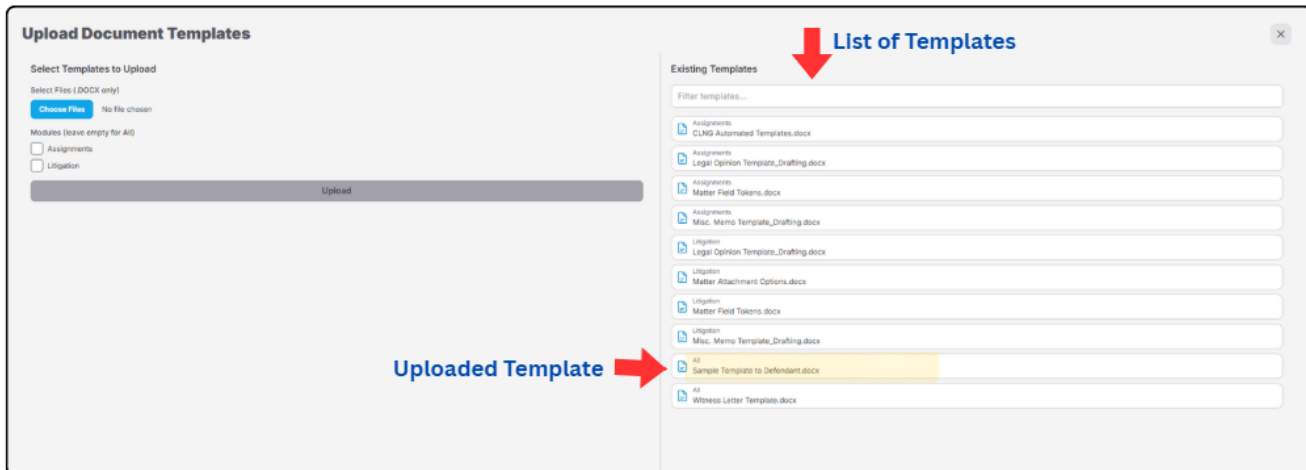
Next, click **Upload** (the blue banner).



A note will appear, **Upload completed Successfully** click **OK**.



The selected file will be added to the list of **Templates in alphabetical order**.



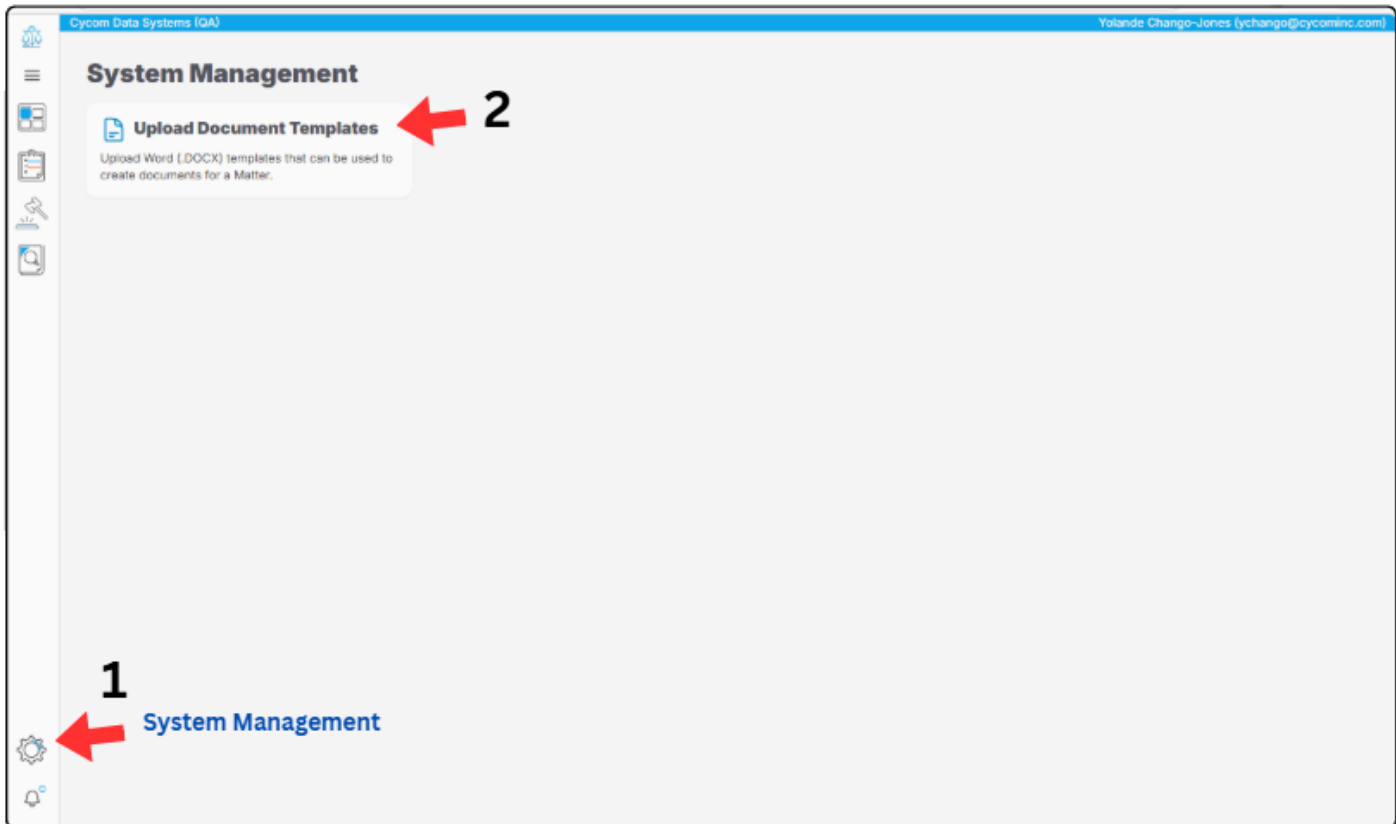
If the document you uploaded **does not have the tokens added**, now is the time to **open the document** by clicking the name of the Template to edit. It will open in a new tab on **Microsoft Word**.

Enter the necessary tokens or make any other changes or **edits** needed. The document will save automatically.

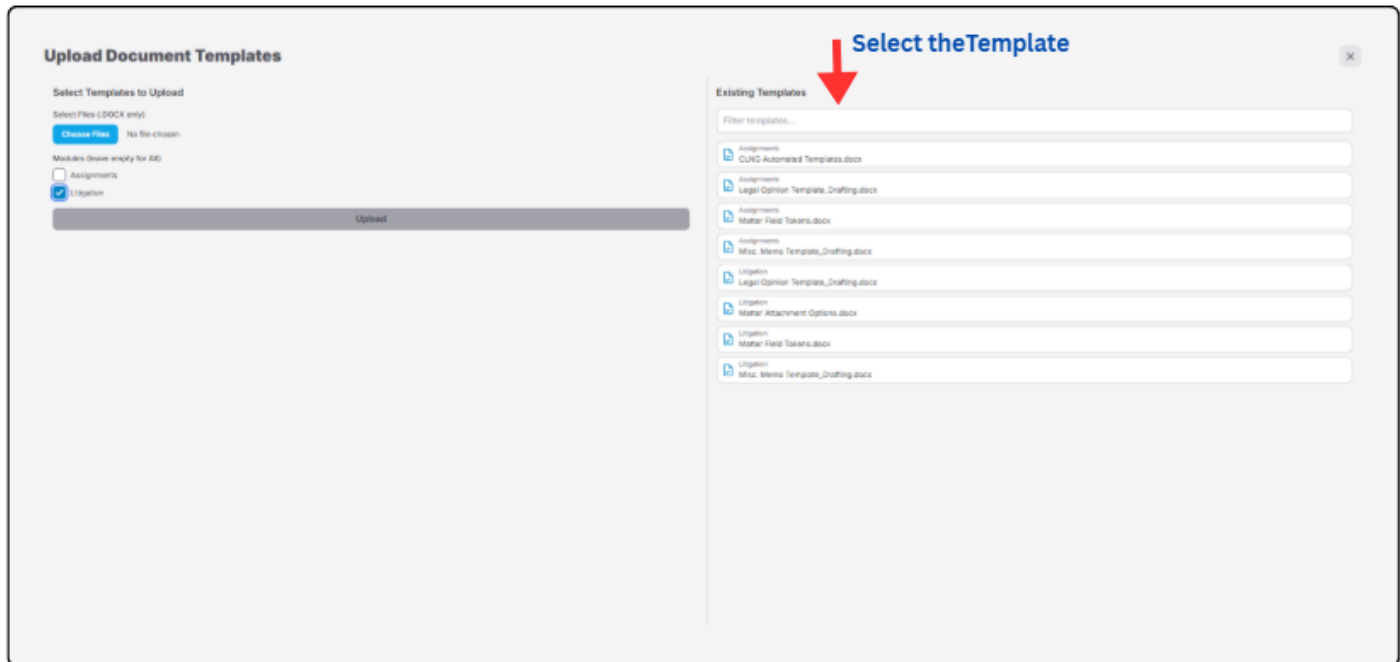
Your Template is now complete and ready to be accessed by users.

Edit Templates

To **edit** a template, go to **CLNG**, click the **System Management** icon (the **Gear** at the bottom of the Global Toolbar), then click **Upload Document Templates**.



An **Upload Document Templates** card will open. In **Upload Document Templates** view, the list of uploaded templates will be listed to the right. **Select and open the document** by clicking the name of the template to edit. It will open in a new tab on **Microsoft Word**. Make the necessary changes or **enter the necessary tokens** if needed. The document will save automatically.



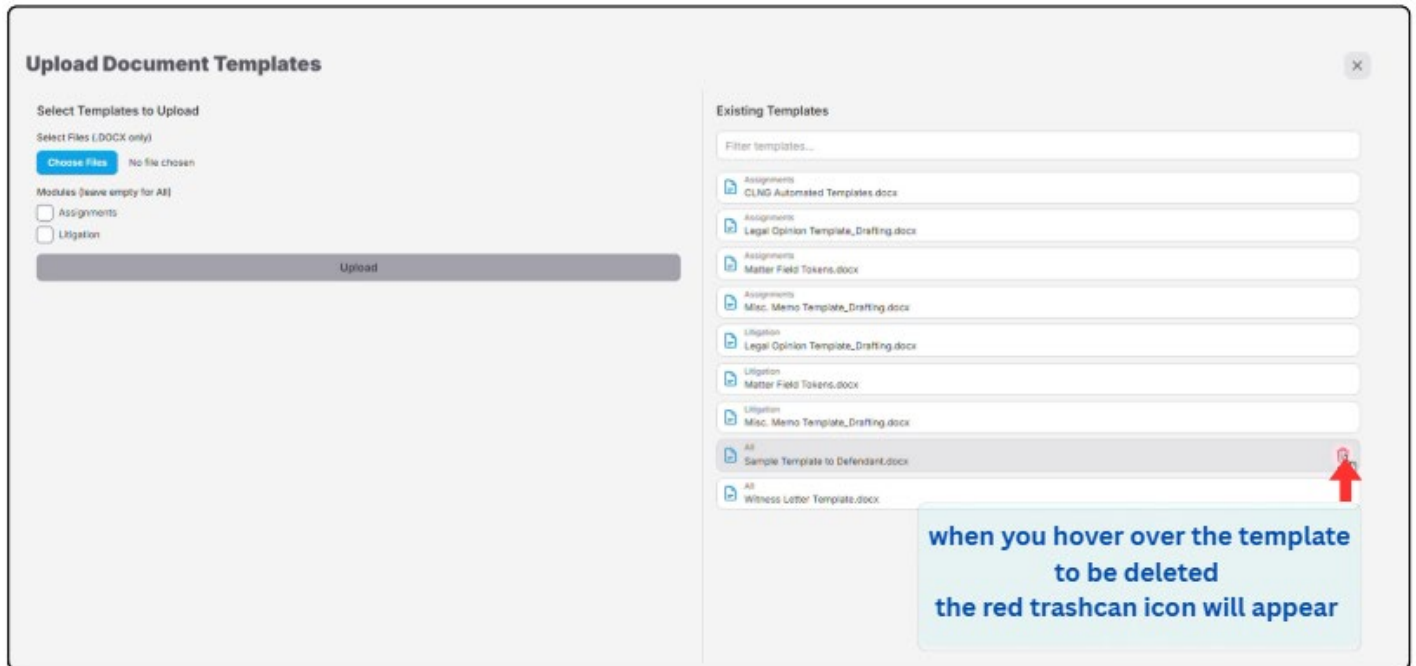
Your Template is now ready to be accessed by users.

Delete Templates

To **delete a Template**, go to **CLNG**, click the **System Management** icon (the **Gear** at the bottom of the Global Toolbar), then click **Upload Document Templates**. An **Upload Document Templates** card will open.

In **Upload Document Templates** view, the uploaded templates will be listed to the right. Locate the document you wish to delete by hovering over the name a red **trashcan** icon will appear to the right, click it.

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Upload Document Templates

Select Templates to Upload

Select Files (.DOCK only)

Choose Files No file chosen

Modules (leave empty for All)

Assignments

Litigation

Upload

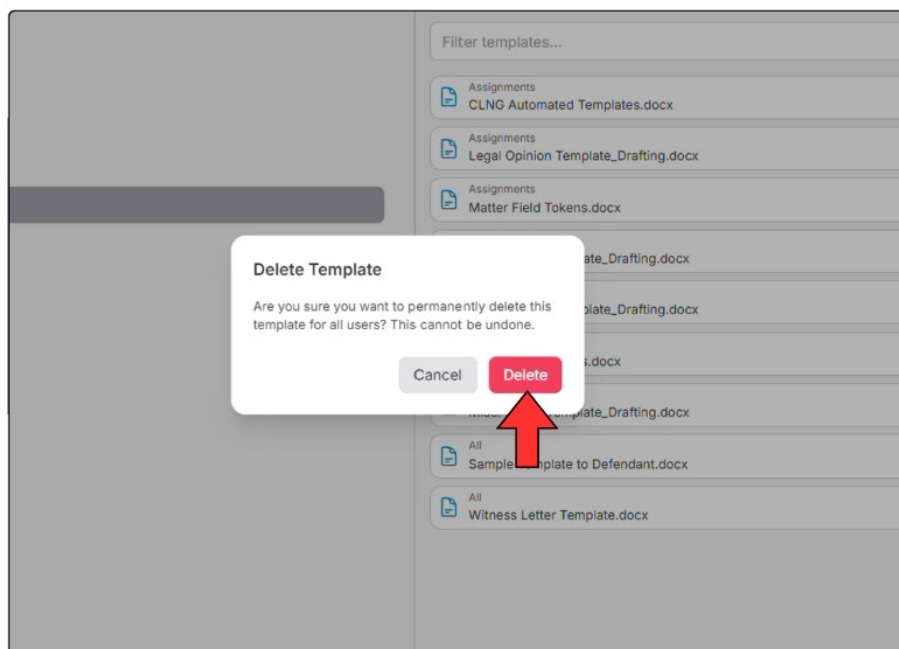
Existing Templates

Filter templates...

- Assignments
CLNG Automated Templates.docx
- Assignments
Legal Opinion Template_Drafting.docx
- Assignments
Matter Field Tokens.docx
- Assignments
Misc. Memo Template_Drafting.docx
- Litigation
Legal Opinion Template_Drafting.docx
- Litigation
Matter Field Tokens.docx
- Litigation
Misc. Memo Template_Drafting.docx
- All
Sample Template to Defendant.docx
- All
Witness Letter Template.docx

when you hover over the template to be deleted the red trashcan icon will appear

A **Delete Template** modal dialogue will appear with two options, **Cancel** or **Delete**. Click **Delete**, the Template will be removed from the list.



Filter templates...

- Assignments
CLNG Automated Templates.docx
- Assignments
Legal Opinion Template_Drafting.docx
- Assignments
Matter Field Tokens.docx
- Assignments
Misc. Memo Template_Drafting.docx
- Litigation
Legal Opinion Template_Drafting.docx
- Litigation
Matter Field Tokens.docx
- Litigation
Misc. Memo Template_Drafting.docx
- All
Sample Template to Defendant.docx
- All
Witness Letter Template.docx

Delete Template

Are you sure you want to permanently delete this template for all users? This cannot be undone.

Cancel **Delete**