

Actionstep Builder

Introduction & Getting Started Tutorial

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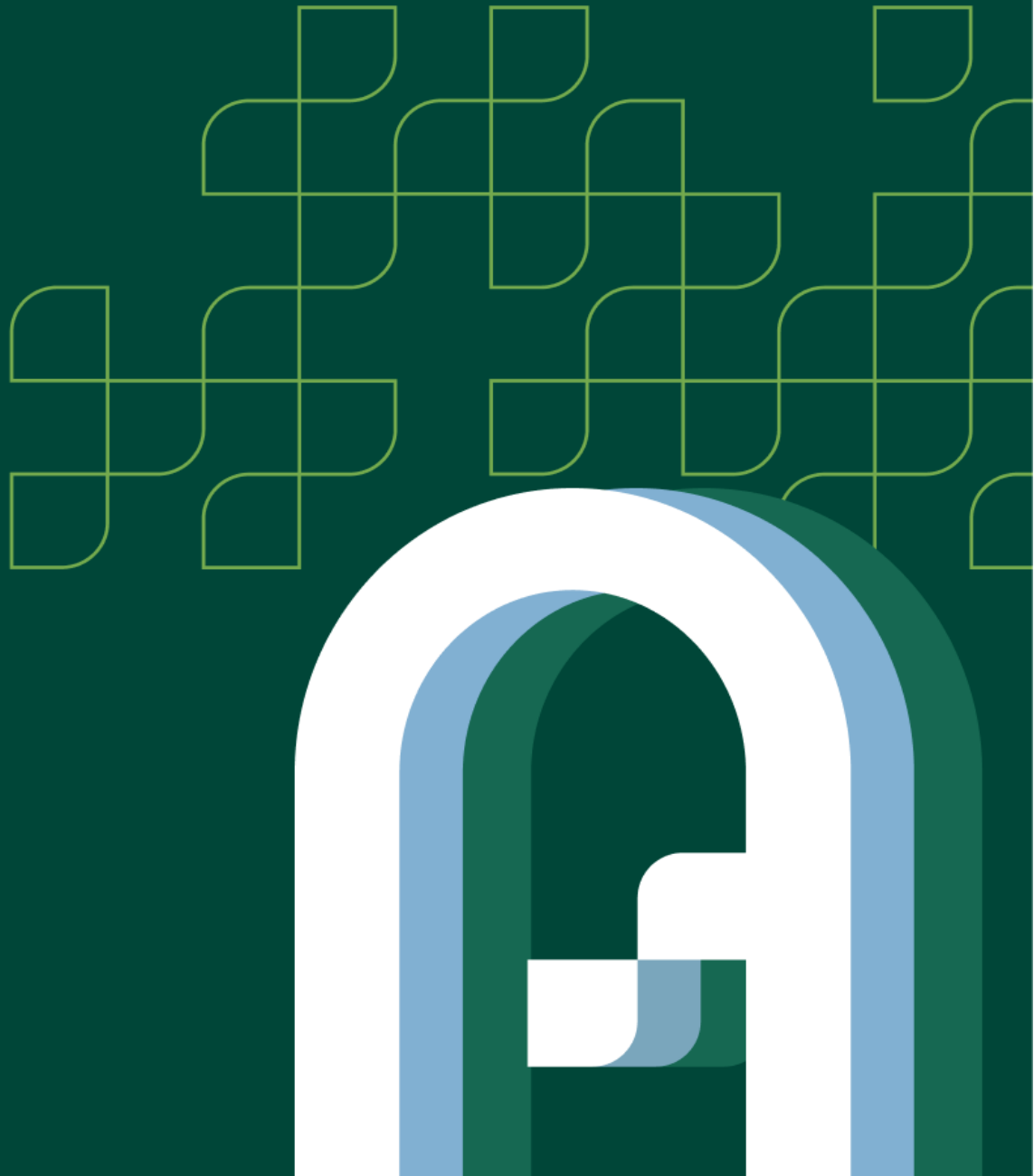


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About Actionstep Builder

Every firm has documents they regularly generate for their different clients. For example, if your firm specializes in estate planning, you most likely have a library of wills, trusts, powers of attorney, etc. that you customize for your clients.

Using Actionstep Builder, you can create templates from these documents. This means that rather than manually drafting a new document or searching within an already-completed document for the last client's information and then replacing it with the new client's details, you can use Builder to replace custom information with variable fields (or placeholders). When you need to create a document for a client, these variable fields are replaced with data from Actionstep, and document text is updated accordingly. Builder also makes it easy to identify optional text that should (or should not) be included in the final document, based on your specific client.

How Does This Work?

Builder works together with Actionstep. Merge fields, custom data, and data collections you've set up in Actionstep are made available in Builder so that you can use them to create your Builder template. Once automation is complete, you can use the template to generate a document for a client or matter. When you do this, the information Actionstep has stored for these variables is automatically shown in the interview and merged into the completed document.

A Few Things to Note About Builder

Builder uses *catalog models*, which are specific groups of templates and variables (or merge fields) that correlate with your matter types in Actionstep. For example, an Estate Planning catalog would include documents like a will, trust, living will, and power of attorney document. It also includes all the variables and formulas that are used to create these documents.

When these different data elements (matter types, data collections, participant types, etc.) are made available to Builder, their names are changed slightly to make it easier to identify them. For example, a Personal Injury matter type is created in Builder as *as:mt_Personal_Injury*, while a data collection called *FranchiseAgreements* is called *as:dc_FranchiseAgreements* in Builder.

Generating Individual Documents vs. Document Sets

One of the benefits of Builder is the ability to associate multiple templates with each other in what's called an *app*. When building your templates for a specific matter type (in Builder,

these are called catalogs), you can add each template either to its own app or to a shared app. Then, when you're ready to create documents for your client or matter, you choose which app you want to use, and any questions required by the templates in the app are asked and individual documents are generated.

What Are the Different Builder Work Areas?

There are two key work areas in Builder: The Online Workspace and the Word Designer (which includes a Builder ribbon in the toolbar).

Word Designer and Builder Ribbon

The Builder ribbon and Word Designer is a Microsoft Word add-in that gives you access to your Builder variables so you can insert them directly into your template file. In this tutorial, we will do most of our work using options on the Builder ribbon and Word Designer.

Online Workspace

The Online Workspace is a browser-based central location for managing the different "parts" of your template automation. Using the Online Workspace, you can review/edit the Actionstep elements associated with your matter types (which, as you've learned, are called *catalogs* in Builder) as well as create any additional variables you might need. You can also use the Online Workspace to test your automated .docx templates before associating the final versions with your matter types in Actionstep.

Generating Builder Documents

Once you've automated your template, you can upload it to its associated matter type in Actionstep. Then, when you or your staff need to create a document for a client, it can be generated from the matter itself. Newly created documents are then saved to the **Documents** page of the matter and are accessible from both the **Documents** and **Matter View** pages.

What Does It All Mean?

Actionstep Builder helps you significantly reduce time you spend manually updating documents using search and replace or manual drafting. It also reduces errors and helps your firm produce more documents with less staff effort. Automating your templates reduces the potential for errors and makes sure your completed documents are correct every time you create a new one for your clients.

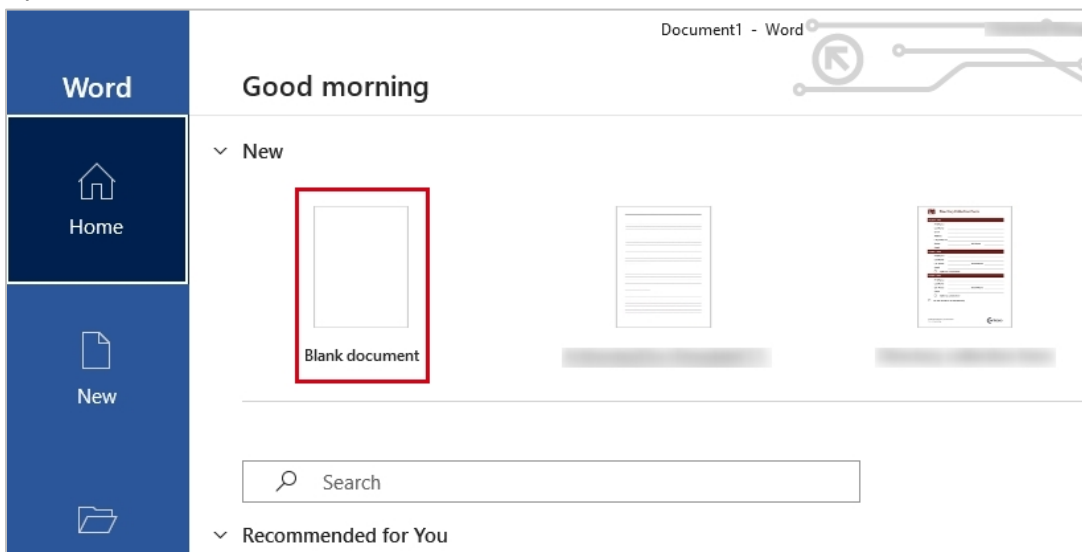
Opening, Saving, and Closing the Tutorial Template

As you complete this tutorial, you will most likely not finish the work in one sitting. At any point, you can save your work, close the template, and return to edit it later. Once a template has been added to Builder, all interaction you have with the template should be managed through the Word Designer and Builder ribbon. This includes using the Builder ribbon to 1) open the Builder copy of the template to edit it, 2) save your changes, and 3) close it.

BEFORE YOU GET STARTED: Use the information in this lesson to open and edit the template you'll create later in this tutorial. It's included at this point in the tutorial so that you can easily find it again, if needed.

To open the template for editing:

1. Open a blank Microsoft Word document.



2. Click the **Builder** tab.
3. Click **Sign In**. The Word Designer pane appears.
4. If needed, click **Sign in with Microsoft** and enter any requested credentials.
5. When the list of next steps appears, click **Choose an existing template to edit**, followed by **PropertyPurchaseLetter_Bldr**.

A separate, *unnamed* Word document is opened, showing the copy of the template (PropertyPurchaseLetter_Bldr) that has been saved to Builder. You can close the first Word window you opened.

Note: Throughout this tutorial, you'll notice the **_bldr** suffix on various component names. This is used simply to distinguish that these components apply only to this tutorial. This suffix is NOT a requirement for components you'll use with your own templates.

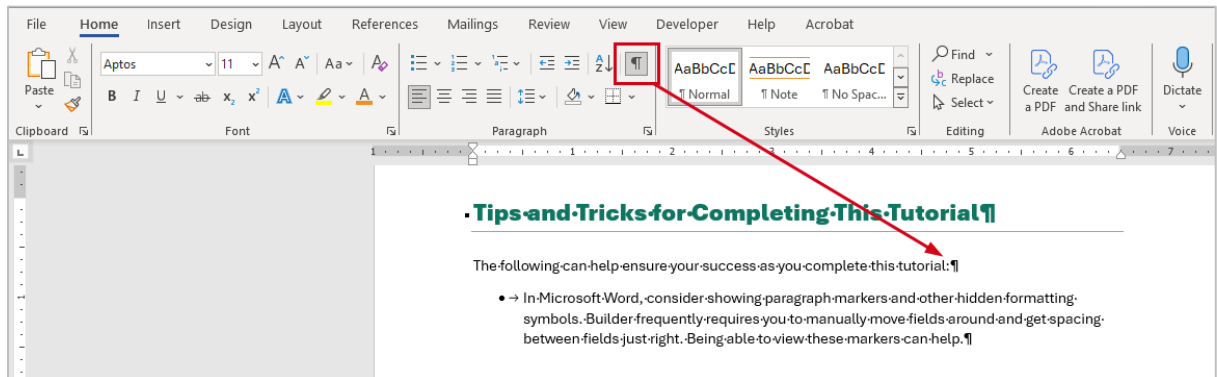
To close the template:

1. When you are finished completing a lesson and need to close the template, click the **Save** button on the **Builder** ribbon. This will save the template and all the variables to Builder.
2. Optionally, to save a *backup copy* of the template file you've been working in to your hard drive, click Word's **Save** button. (Note that for each Builder session, you will be prompted to provide a filename when you save or close the template. Follow the instructions for doing so in the Microsoft Word Help.)
3. Click **Sign Out** on the Builder ribbon to close Builder.

Tips and Tricks for Completing This Tutorial

The following can help ensure your success as you complete this tutorial:

- A lot of the components and variables you'll use or create in this tutorial include a **_bldr** suffix on the component name. This is used simply to distinguish that these apply only to this tutorial. This suffix is NOT a requirement for components you'll use with your own templates.
- In Microsoft Word, consider showing paragraph markers and other hidden formatting symbols. Builder frequently requires you to manually move fields around and get spacing between fields just right. Being able to view these markers can help.



- Variable and instruction fields in Builder must be inserted in a template between curly and square brackets, like this: {[LetterDate|format: "MMMM D, YYYY"]}
- When working in your Word template, you may experience errors when saving your template. Error messages typically include a field number to help you identify the area where the issue is. Use the **Go to Field** icon on the **Builder** ribbon to more quickly find the field.
- Click the **Save** icon in the **Builder** ribbon often to save your work. (When you click the **Save** icon in the Builder ribbon, all the changes you've made to the template and components in the template are saved to Builder. To save the Word file itself, click Word's **Save** icon. Just know you're saving a back-up copy of the file since the primary file is saved in Builder.)
- If you need additional help, the following resources are available:
 - [Actionstep Builder Help](#)
 - [Supplementary Help from Knackly](#)
 - [Video Trainings from Knackly](#)

Lesson 1: Install the Matter Type You'll Use During the Tutorial

To complete this tutorial, you must install a "demonstration" matter type in Actionstep. This matter type (which is called *BuilderDemo*) contains custom data types and data collections you will use as you complete this tutorial. (See the "Appendix" on page 102 to learn more about the different components of this matter type.)

Once installed, you will then sync Actionstep with Builder. Doing this makes the different data fields (both default and custom) used in your Actionstep system available for you to use as you automate your templates. This, specifically, will update Builder with the fields available in the Builder Demo matter type.

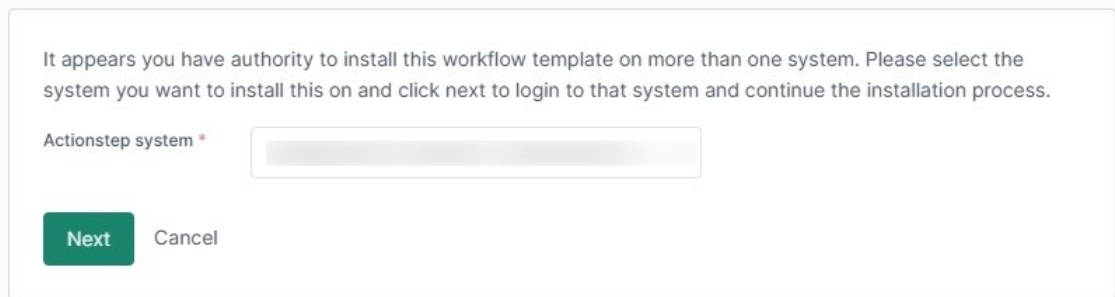
This step does require admin privileges. If you are not an admin, please contact your system admin for assistance.

Part 1: Install the BuilderDemo Matter Type

To install the BuilderDemo matter type:

1. Click this link: https://go.actionstep.com/frontend/billing/system/install-workflow-template?template_identifier=169056ff5b970511e6961d58607db6bc3f91a08e. The Select System to Install To page appears.

Select system to install to



2. Click the **Actionstep system** drop-down list and choose which system you want to add the matter type to.



3. Click **Next**.
4. If prompted to accept the changes to your subscription, select the checkbox and click **Install**. The matter type is installed.

NOTE: If you choose, you can review the matter type by going to **Admin > Matter Types > BuilderDemo**. Additionally, if you want to limit access to this matter type to only those who will be participating in this tutorial, go to **Admin > Users & permissions > Data permissions**. Choose the role you want to adjust from the **System Role** drop-down list, and then choose **Action Type BuilderDemo** from the **System Object** drop-down list. Then, using the options in list below, assign the different levels of access. You might also consider setting permissions to reduce the chance matters will be created against this matter type erroneously.

Part 2: Sync the Actionstep Data with Builder

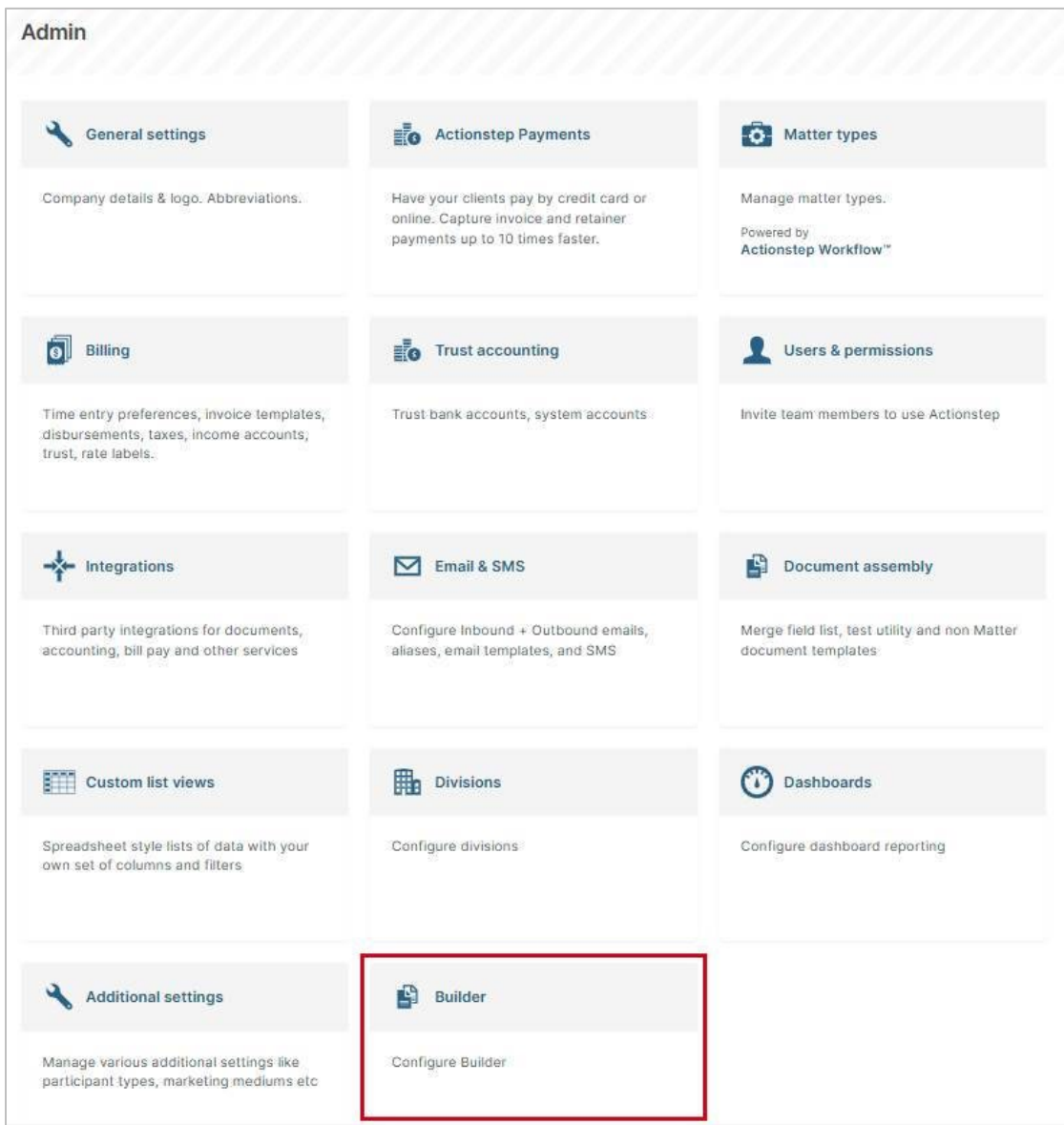
You will now sync Actionstep with Builder, which will give you access to the data specific to this matter type as well as the default participant and matter type data.

This step does require admin privileges. If you are not an admin, please contact your system admin for assistance.

To do this:

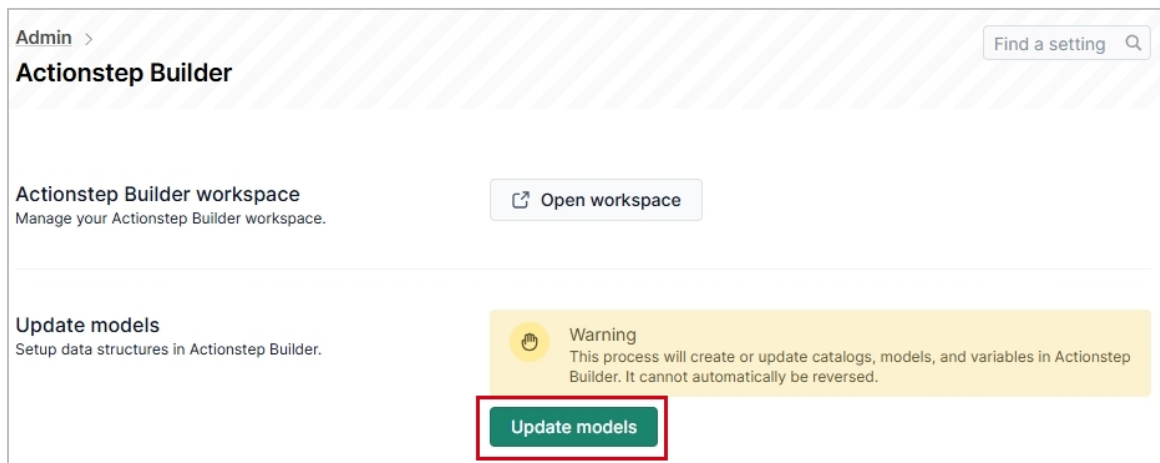
1. Open and sign in to Actionstep (if you haven't already).
2. Click **Admin** (located near the top-right corner of the page) to view the main Admin page.

3. Click the **Builder** tile.

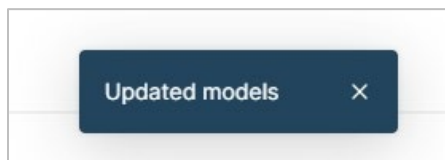


The Actionstep Builder page appears.

4. Click **Update models**.



Once the update is complete, you will see a notification along the bottom of the Actionstep window:



You can now proceed with the remainder of the lessons in this tutorial.

NOTE: If you later make changes to this matter type (or any matter type you connect to Builder in the future), you will need to sync those changes with Builder. You can do this by using this **Update models** button again.

Lesson 2: Set Up Your Builder Catalog in Builder

Background Information

In Builder, a *catalog model* is a specific group of templates and variables (or merge fields) that correlate with your matter types in Actionstep. For example, an Estate Planning catalog might include documents like a will, trust, living will, and power of attorney document. It might also include all the variables and formulas that are used to create these documents.

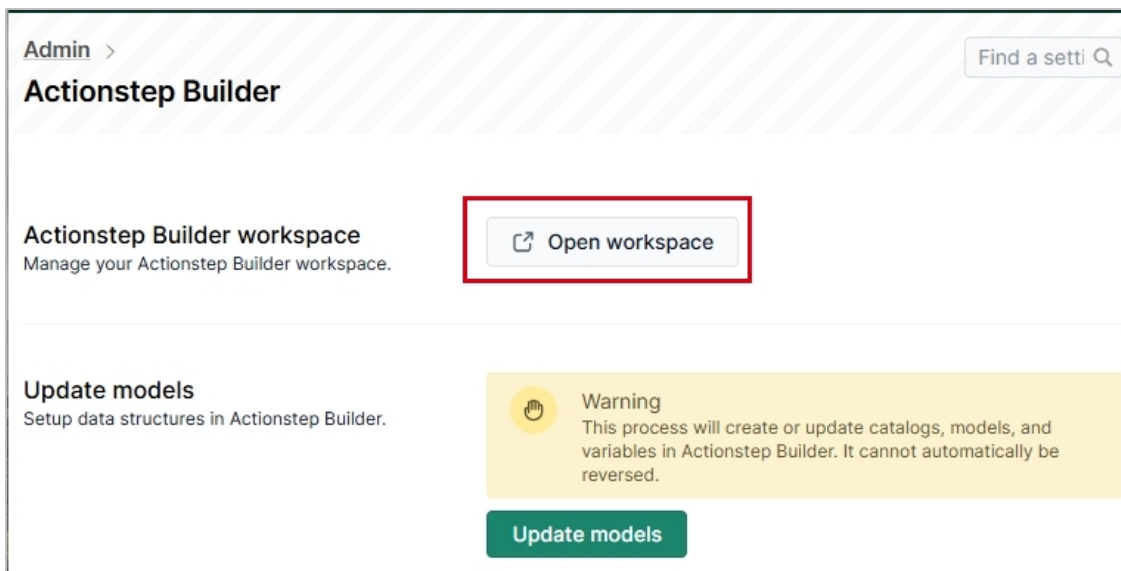
When you create a new matter type in Actionstep and then sync your work with Builder, you must create a catalog model and associate it with the new matter type. This makes the custom participant and matter fields in the matter type available for you to use in your templates.

Complete the Lesson

In Lesson 1, you synced the BuilderDemo matter type with Builder. In order to use the different components of the matter type in your template, you must create a Builder catalog and link it to the matter type.

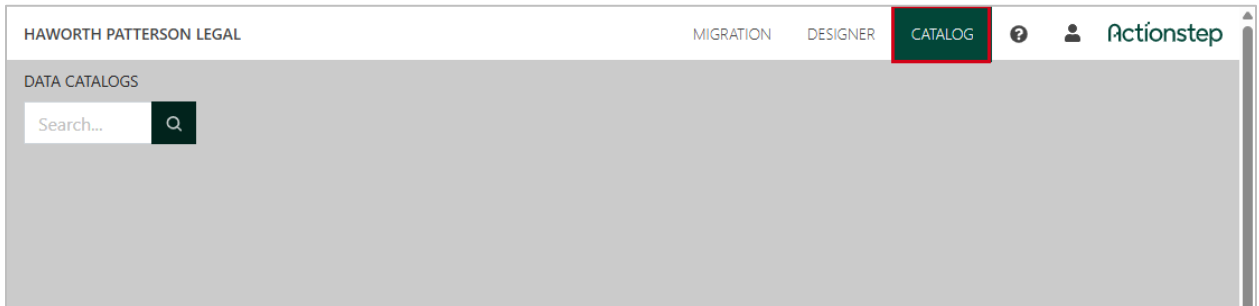
To do this:

1. In Actionstep, go to **Admin > Builder** and click **Open workspace**.

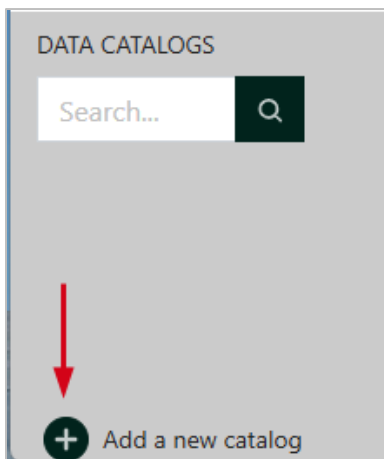


This opens the Builder Online Workspace. (If you're prompted to sign in first, go ahead and enter your sign-in credentials first.)

2. In the Builder Online Workspace, click the **Catalog** tab (top-right corner of the page).



3. Click **Add a new catalog**. (You may need to scroll to the bottom of the page to see this option.)



The New Catalog window appears.

4. In the **Name** field, type **BuilderDemo**.
5. Click the **Type** drop-down list and choose **as:mt_BuilderDemo**. (It's located near the bottom of the list.)
6. Select **Grant access to everyone by default**.

The window should be filled out like this:

A screenshot of the 'New Catalog' dialog box. It has a title bar 'New Catalog'. Inside, there are two input fields: 'Name' with the text 'BuilderDemo' and 'Type' with a dropdown menu showing 'as:mt_BuilderDemo'. Below these fields is a checkbox labeled 'Grant access to everyone by default' which is checked. At the bottom, there are two buttons: 'Ok' and 'Cancel'.

7. Click **OK**. The catalog is created.

The screenshot shows the 'CATALOG' configuration page in the Actionstep application. The page is titled 'HAWORTH PATTERSON LEGAL' and has tabs for 'MIGRATION', 'DESIGNER', and 'CATALOG'. The 'CATALOG' tab is active. On the left, there is a sidebar with 'DATA CATALOGS' and a search bar. Below the search bar, a button labeled 'BuilderDemo' is visible. The main area is titled 'DETAILS' and contains the following fields:

- CATALOG NAME:** BuilderDemo
- LABEL (PLURAL):** Builder demo
- CATALOG ITEM TYPE:** as:mt_BuilderDemo
- COLUMNS:**
 - ☒ Item Summary template
 - ☒ Last Modified date
 - ☐ Created By
- ITEM DETAIL TEMPLATE:** (Empty text box)
- CREATE RECORD LABEL:** Create record
- GLOBAL INFO LABEL:** Global Info
- DEFAULT FILTERS:**
 - ☐ My records

At the bottom, there are four links: 'ENABLED', 'APPS ON THIS CATALOG', '"LIVE" VERSION', and 'APP SETTINGS (PER CATALOG)'.

We'll cover working in the Online Workspace in later lessons. For now, you can close this browser tab or window if you'd like.

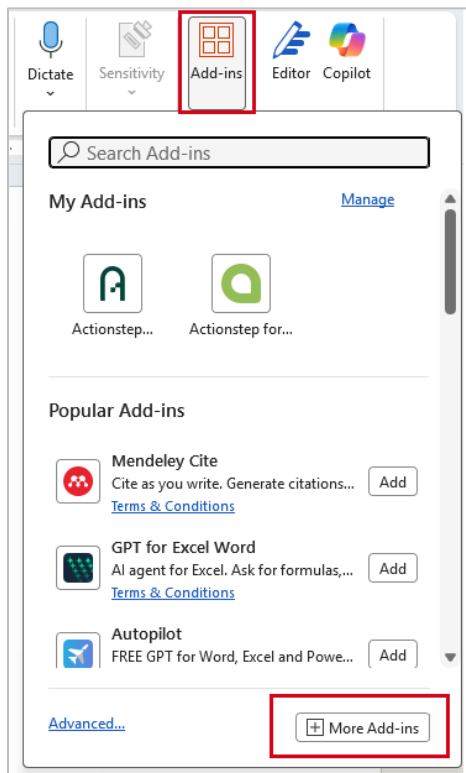
Lesson 3: Install the Builder Word Add-in

As you develop your templates, you will use Builder's Word Designer, which gives you access to the variables, formulas, and templates you will use.

In this lesson, you will learn how to download and install the Builder add-in for Microsoft Word. You'll also learn how to select the Builder workspace you want to work in and sign in to that workspace. If you have already completed these steps, you can proceed to "Lesson 4: Open the Builder Word Designer and Create a Template" on page 17.

To install the Builder add-in:

1. Open a blank document in Microsoft Word.
2. Click the **Home** tab.
3. Click **Add-ins**. The Add-Ins menu appears.
4. Click **More Add-Ins**.

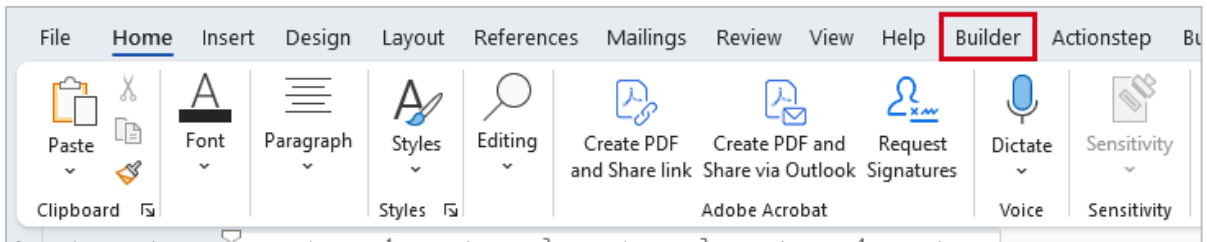


The Apps window appears.

5. Search for **Actionstep Builder for Word**. Then select it and **Add** it.
6. Once the **Add** option changes to **Added**, close the window.

Once you've installed the Actionstep Builder add-in, you will see a new **Builder** tab

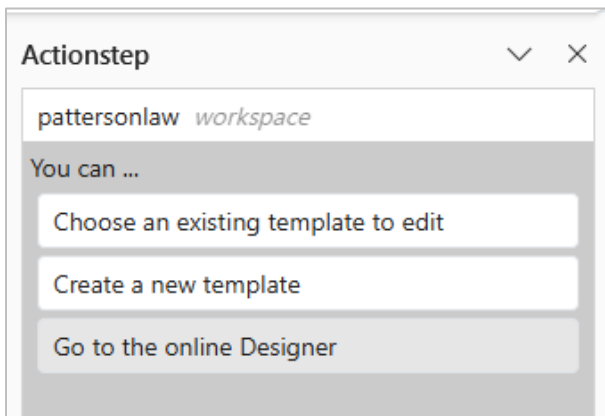
in your Word document.



7. Click the **Builder** tab.
8. Click **Sign in**. The Word Designer pane appears on the right side of the Word window.
9. Click **Sign In with Microsoft** and provide your sign-in credentials. (Remember these credentials as you may need to provide them again in the future.)

NOTE: If you are prompted to enter or select your **Workspace** name, do so. If you are unsure of your workspace name, work with your admin. This is typically your orgkey name, which you can either pull from Actionstep or from the URL used to launch Builder.

10. Once you are signed in, the panel is updated to show the different options for your workspace.



You've now installed and set up the connection between Word and Builder.

11. Close Word. (If prompted, don't save any changes. In the next lesson, you will work with an existing document.)

Lesson 4: Open the Builder Word Designer and Create a Template

Background Information

Templates are key to your document generation workflow. When you create a template, it is always associated with a specific catalog. As long as that catalog is based on a matter type in Actionstep, it will automatically have access to all the matter type's merge fields/variables. For example, if you create a new employment agreement template in your Human Resources catalog, the fields (and underlying data) associated with employment and human resources should automatically be available to use in your automation.

IMPORTANT NOTE: Once you create a template and it has been added to Builder, the template is actually stored in Builder. This means that to edit the Builder template, you must open it and save it using the options available on the Builder ribbon. You can save a copy of the template to your hard drive, but as you work in it, you must use the Builder ribbon options to sync it with Builder.

Complete the Lesson

This lesson shows you how to open Builder's Word Designer and use it to create a template.

To do this:

1. Using Microsoft Word, open the **PropertyPurchaseLetter.docx** file you received as part of this tutorial.

 **Reliable Law**
LEXINGTON, KY

November 16, 2024

JACOB G. ROCHESTER
734 Park Slope Rd.
Apt. 12
Lexington, KY 40502

PURCHASE OF 1872 WINWOOD TRACE

Dear Jacob,

Thank you for engaging us to assist you with your property purchase.

Please note the following details:

Property:	1872 Winwood Trace, Vineyard, KY 40356
Seller:	David Patterson
Purchase Price:	\$395,799
Deposit:	\$42,095
Special Condition 1:	Land inspection report on the structural soundness of the property, to be completed by a licensed surveyor or a structural engineer or a person of your choice holding professional indemnity insurance. Due: November 29, 2024
Special Condition 2:	Termite inspection certificate to be prepared by a registered termite inspection company. Due: November 29, 2024

Tenancy

As per the contract, the seller has advised that the property has a tenancy that ends before the settlement date.

Fees and Costs

Our fees and costs are as follows:

- Fixed Professional Fee: \$2300
- Property Details Search: \$825
- Settlement Fee: \$200

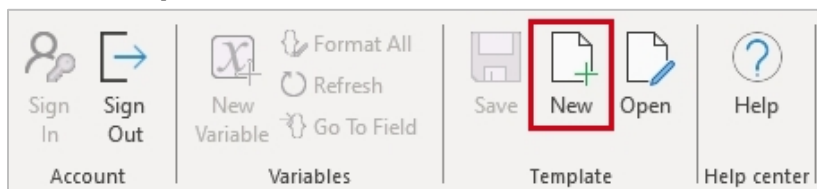
Total fees and costs: \$3325

Our team looks forward to assisting you.

Regards,
Matthew P. Sinclair

Wills | Estates | Employment | Property | Commercial | Administrative
Lexington | Louisville | www.ReliableLaw.com

2. Click the **Builder** tab. The Builder ribbon is displayed.
3. Click **Sign In**. The Word Designer pane appears. (If you need to sign in, do so now.)
4. In the **Template** section of the **Builder** ribbon, click **New**.

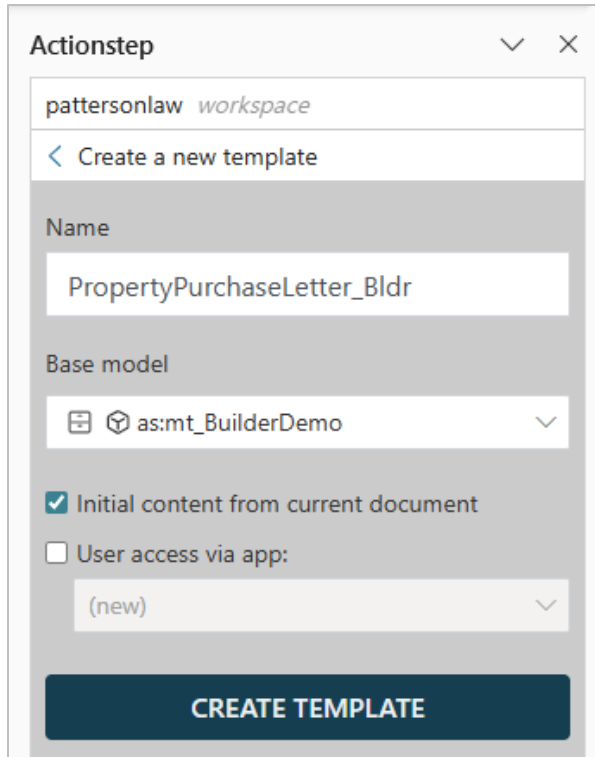


The Word Designer pane displays your options for creating a new template.

5. Enter **PropertyPurchaseLetter_Bldr** in the **Name** field.
6. Click the **Base model** drop-down list and choose **as:mt_Builder_Demo**. This means the template will be associated with the BuilderDemo matter type/catalog.
7. Select **Initial content from current document**.
8. Clear **User access via app**.

NOTE: An *app* is used to make one or more templates available for generating. We'll cover associating this template with an app in Lesson 20.

The new template form should look like this:




The screenshot shows a form titled 'Actionstep' with a close button (X) and a dropdown arrow (v). The form is set to the 'pattersonlaw workspace'. Below the workspace name is a link '< Create a new template'. The 'Name' field contains 'PropertyPurchaseLetter_Bldr'. The 'Base model' dropdown is set to 'as:mt_BuilderDemo'. There are two checkboxes: 'Initial content from current document' (checked) and 'User access via app:' (unchecked). Below the second checkbox is a dropdown menu showing '(new)'. At the bottom is a large blue button labeled 'CREATE TEMPLATE'.

9. Click **Create Template**.

The template is created and connected to your instance of Builder. The **Template** field in the Word Designer shows the name of the template. From now on, any changes you make to the template and save using Builder's **Save** button will be saved directly to Builder.

Additionally, the Word Designer now lists all the variables, formulas, and templates that are available to use when automating the template. This is the data that was "pulled over" from Actionstep when you synced Actionstep and Builder in "Lesson 1: Install the Matter Type

You'll Use During the Tutorial".

**Reliable Law**
LEXINGTON, KY

November 16, 2024

JACOB G. ROCHESTER
734 Park Slope Rd.
Apt. 12
Lexington, KY 40502

PURCHASE OF 1872 WINWOOD TRACE

Dear Jacob,

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Please note the following details:

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Deposit:	\$42,095
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Special Condition 2.	Termite inspection certificate to be prepared by a registered termite inspection company. Due: November 29, 2024

Tenancy

As per the contract, the seller has advised that the property has a tenancy that ends before the settlement date.

pattersonlaw workspace

template *PropertyPurchaseLetter_Bldr*

Search...

☒ variables
☐ formulas

☐ templates
☐ global

pt_Client >

as:action_participant list ...

pt_Buyer_Bl...

as:action_participant list ...

pt_Seller_Bld...

as:action_participant list ...

pt_Matter_L...

as:action_participant list ...

dc_Speci...

as:dc_SpecialConditions list ...

dc_PropertyDe...

as:dc_PropertyDetails ...

pt_special_opti...

as:pt_special_options ...

Matter >

as:action ...

System >

as:system ...

Lesson 5: Replace a Date with a Date Variable

Background Information

Variables are the basic component of any Builder system. They are used to merge custom data in the documents you are creating for your clients and matters.

When you create a template, it is associated with a specific Builder *catalog*, which acts as a container for all matter-related components (like templates, variables, etc.). This means that if your catalogs are based on Actionstep matter types, the template automatically comes “preloaded” with Actionstep variables for you to use in it. You can identify these variables by their Actionstep-specific prefixes, like **as:**, **pt_**, or **dc_**.

There may be times when you need to use variables that aren't currently available in Actionstep or Builder. In these cases, you should first determine if the data the variable is asking for should be available in Actionstep. If so, you should first create a custom data field for the participant type or data collection in Actionstep. You can then sync Actionstep and Builder and the new variable will be available for use in automating your template.

If you need to create variables that you don't want stored in Actionstep, you can create them in either the Word Designer or the Online Workspace. In this tutorial, we'll first cover how to create them in the Word Designer. In later lessons, you'll learn how to create variables using the Online Workspace. As long as you save and refresh the two work areas, you will have access to changes you're making in both environments.

NOTE:

- Variables are created and accessed at the catalog level rather than the template level. That way, all templates you associate with your catalog (and therefore your matter type) will have access to the same set of variables.
 - Variable fields are marked using {[]} characters. In a Word template, regular variables are highlighted blue and use blue text. *If* instruction variables are highlighted in green and use green text, while *list* instruction variables are orange.
-

Complete the Lesson

You will now create a basic date variable and insert it in the template.

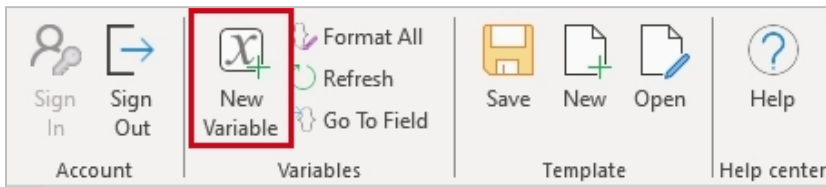
To do this:

1. If you've closed the Property Purchase Letter, open it again. (See “Opening, Saving, and Closing the Tutorial Template” on page 5 for help.)

2. Review the template. You'll see there is a lot of personalized information that will need to be replaced with variables.

The first section of text you'll want to replace with custom answers is the date, **November 16, 2025**.

3. Click the **Builder** tab in the Word toolbar.
4. In the **Variables** section of the **Builder** ribbon, click **New Variable**.



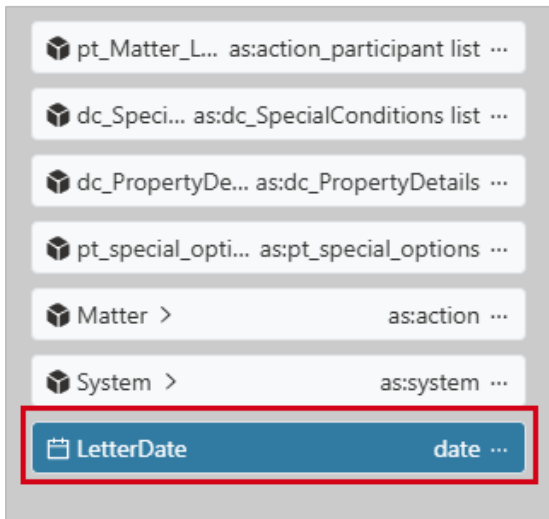
The **New Variable** window appears.

5. Make sure **as:mt_BuilderDemo** is selected from the **New Variable in Model** drop-down list.
6. Select **Single** and choose **Date** from the field next to it.
7. In the **Variable Name** field, enter **LetterDate**.
8. In the **Question Prompt** field, enter **Enter the date you are sending the letter**.

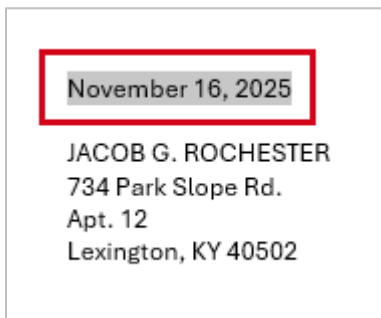
The New Variable window should look like this:

A screenshot of the 'New Variable' dialog box. At the top, 'New Variable in Model' is followed by a dropdown menu showing 'as:mt_BuilderDemo'. Below this, there are two radio buttons: 'Single' (which is selected) and 'List of'. To the right of the 'List of' radio button is a dropdown menu showing 'date'. Under the heading 'VARIABLE NAME', there is a text input field containing 'LetterDate'. Under the heading 'QUESTION PROMPT', there is a text input field containing 'Enter the date you are sending the letter'. At the bottom of the dialog, there are two buttons: 'Ok' and 'Cancel'.

9. Click **OK**. The variable is added to the variable list.



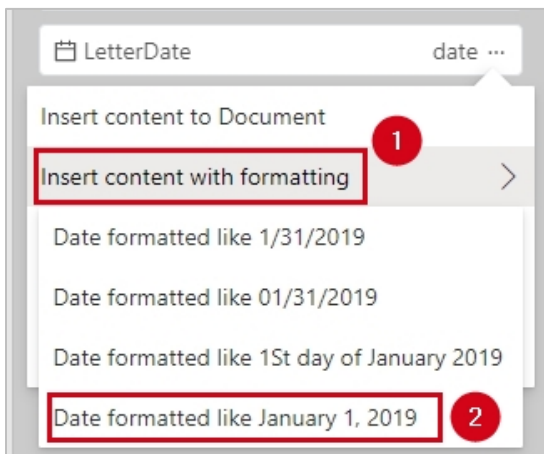
10. In the template, select/highlight the text **November 16, 2025**.



11. Click the ellipses icon on the **LetterDate** variable in the Word Designer.



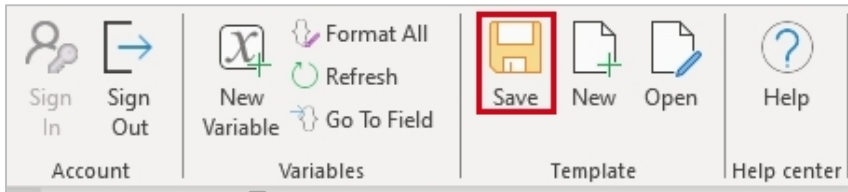
12. Choose **Insert content with formatting**, followed by **Date formatted like January 1, 2019**.



The text is replaced with the LetterDate variable.



13. Click the **Save** button on the **Builder** ribbon to save your work.



When you click the **Save** button on the **Builder** ribbon, all the changes you've made to the template and components in the template are saved to Builder.

NOTE: If you need to save a back-up copy of the template to your computer, you can also click Word's **Save** button. To learn more about working with Word files, see "Opening, Saving, and Closing the Tutorial Template" on page 5.

Lesson 6: Understand How Actionstep Data is Used in Builder

In the previous lesson, you used Builder to create a brand-new date variable, which you inserted in the template. In the next lesson, you will insert a series of variables that have already been created in Actionstep. In this lesson, we'll provide some background information on how Actionstep variables work in Builder.

By using Actionstep variables in Builder, you can ensure that when you generate a document from a Builder template, data relating to that client or matter will be "pulled" from Actionstep into the completed document.

Variables that originate in Actionstep are organized in what are called *object models*. These are like containers that organize general fields, like *name*, *address*, *gender*, *date of birth*, etc. These fields are then associated with a specific type of participant or matter, like a *buyer* or *seller*.

When using a variable from a participant or matter type field, the object model name must be included in the variable field, along with the variable name.

Additionally, participant type data fields are multi-answer, which allows you to add more than one person to a party type. Because of this, when using a participant type variable in Builder, you must be specific about which party you want to merge information for. You can use an *index marker* to do this.

In short, when working with these Actionstep fields, rather than have a participant type field like this:

{[FirstName]}

A participant type field should look something like this:



In the next lesson, you will learn how to insert this kind of field.

Lesson 7: Replace Text with Text Variables

As mentioned in “Lesson 6: Understand How Actionstep Data is Used in Builder,” participant type variables allow for multiple answers. In this letter, however, you want only the first (or primary) buyer and seller participant to be listed.

You can specify which record from the list you want to merge in the document by including an index number for that specific record. In Builder, indexing starts at 0, which means if you want the first party in the list, you’ll enter a [0]. Let’s show you how.

In this lesson, you will work with the **pt_Buyer_Bldr** object model and its variables.

NOTE: All participant type object models have names with an **as:pt_** prefix in Builder.

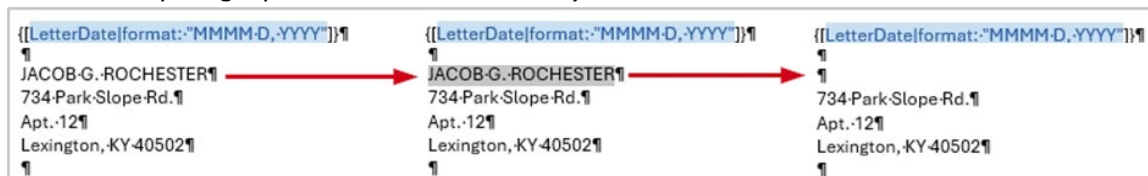
This lesson includes two parts:

1. Replacing *Buyer* and *Seller* fields using the **Buyer_Bldr** and **Seller_Bldr** object models
2. Adding index markers to indicate which records you want to pull from Actionstep

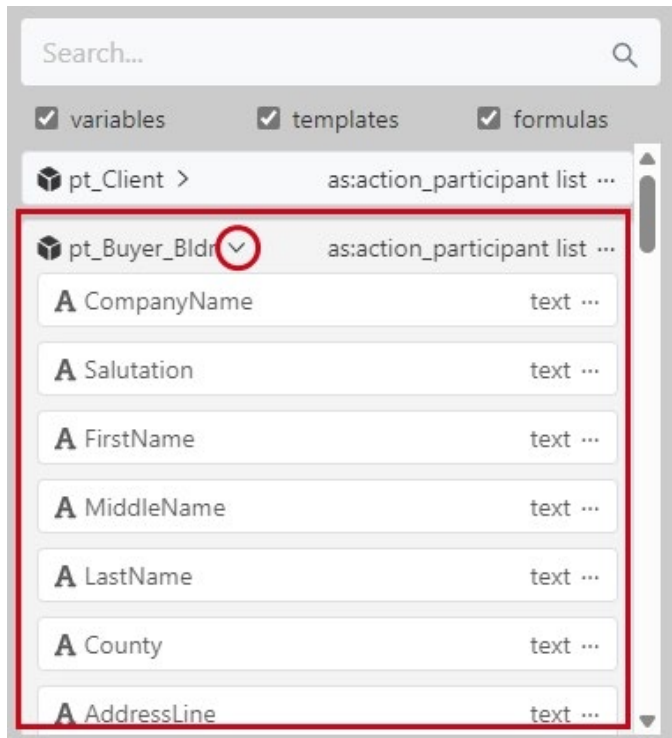
Part 1: Replace Buyer and Seller Fields with Object Model Variables

To do this:

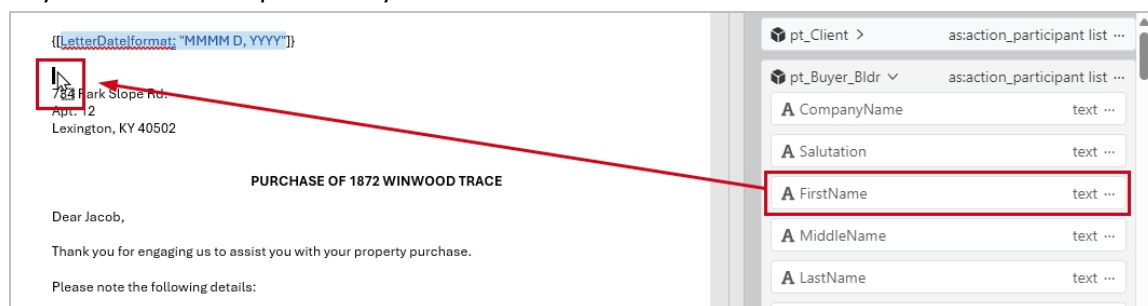
1. If you’ve closed the Property Purchase Letter, open it again. (See “Opening, Saving, and Closing the Tutorial Template” on page 5 for help.)
2. In the template, select and delete the text *JACOB G. ROCHESTER* but do not remove the line this text appears on. (To do this, make sure you select ONLY the text and not the hidden paragraph mark after the text.)



3. In the Word Designer, find the **pt_Buyer_Bldr** variable and click it to expand the list of variables associated with it.



4. Click on the **FirstName** variable and drag it to the place in the document where the buyer's first name previously was.



The variable field (which includes the model name) is inserted in the document.



5. Add a space after the variable you just inserted and then drag **LastName** to the template.
6. Repeat these steps for remaining text in the address block:

734 Park Slope Rd.	pt_Buyer_Bldr.MailingAddressLine1
Apt. 12	pt_Buyer_Bldr.MailingAddressLine2
Lexington	pt_Buyer_Bldr.MailingCity
Kentucky	pt_Buyer_Bldr.MailingStateProvince
40502	pt_Buyer_Bldr.MailingPostCode

7. Replace the name in the letter's salutation (**Jacob**) with **pt_Buyer_Bldr.FirstName** by dragging **FirstName** to this line.

When you're finished, your template should look like this:

```

{{LetterDate|format: "MMMM D, YYYY"}}

{{pt_Buyer_Bldr.FirstName}} {{pt_Buyer_Bldr.LastName}}
{{pt_Buyer_Bldr.MailingAddressLine1}}
{{pt_Buyer_Bldr.MailingAddressLine2}}
{{pt_Buyer_Bldr.MailingCity}}, {{pt_Buyer_Bldr.MailingStateProvince}} {{pt_Buyer_Bldr.MailingPostCode}}

PURCHASE OF 1872 WINWOOD TRACE

Dear {{pt_Buyer_Bldr.FirstName}},

Thank you for engaging us to assist you with your property purchase.

```

On Your Own

In addition to the buyer, this letter includes a table that has information about the seller. Following the previous instructions, in the **Seller** row of the table, replace **David Patterson** with variables from the **pt_Seller_Builder** object model. Specifically, add **FirstName** and **LastName** to this row.

It should look like this when you're finished:

Dear {{pt_Buyer_Bldr.FirstName}},

Thank you for engaging us to assist you with your property purchase.

Please note the following details:

Property:	1872 Winwood Trace, Vineyard, KY 40056
Seller:	{{pt_Seller_Bldr.FirstName}} {{pt_Seller_Bldr.LastName}}
Purchase Price:	\$395,799
Deposit:	\$42,095
Special Condition 1.	Land inspection report on the structural soundness of the property, to be completed by a licensed surveyor or a structural engineer or a person of your choice holding professional indemnity insurance.

If you save your work at this point, you will receive errors. This is because you still need to indicate which participant record these variables should pull from Actionstep. We'll cover how to do this in the next part of this lesson.

Part 2: Set Up Participant Variables to Pull a Specific Participant Record

As mentioned in "Lesson 6: Understand How Actionstep Data is Used in Builder," participant type variables allow multiple answers. In this letter, however, we want only the first (or primary) buyer and seller participant to be listed. You can specify which record from the list you want to merge in the document by including an index number for the record you want to use. In Builder, indexing starts at 0, which means if you want the first party in the list, you'll enter a [0]. Let's show you how.

To do this:

1. In the address section in the template, find the **pt_Buyer_Bldr.FirstName** field and type a **[0]** after the **pt_Buyer_Bldr** object model name but before the period that separates it from the **FirstName** variable name, like this. The highlight is used to help you see the exact placement:

```
{{[pt_Buyer_Bldr[0].FirstName]}}
```

This tells Builder to pull the first name for the first contact listed for the buyer.

On your own:

1. Add this same index marker to the remaining *Buyer* and *Seller* participant fields, like this:

In the address block:

```
{[pt_Buyer_Bldr[0].LastName]}  
  
{[pt_Buyer_Bldr[0].MailingAddressLine1]}  
  
{[pt_Buyer_Bldr[0].MailingAddressLine2]}  
  
{[pt_Buyer_Bldr[0].MailingStateProvince]}  
  
{[pt_Buyer_Bldr[0].MailingPostCode]}
```

In the salutation:

```
{[pt_Buyer_Bldr[0].FirstName]}
```

In the table:

```
{[pt_Seller_Bldr[0].FirstName]}  
  
{[pt_Seller_Bldr[0].LastName]}
```

Your template should now look like this:

[[LetterDate|format: "MMMM D, YYYY"]]

```
{[pt_Buyer_Bldr[0].FirstName]} {[pt_Buyer_Bldr[0].LastName]}  
{[pt_Buyer_Bldr[0].MailingAddressLine1]}  
{[pt_Buyer_Bldr[0].MailingAddressLine2]}  
{[pt_Buyer_Bldr[0].MailingCity]}, {[pt_Buyer_Bldr[0].MailingStateProvince]}  
{[pt_Buyer_Bldr[0].MailingPostCode]}
```

PURCHASE OF 1872 WINWOOD TRACE

Dear {[pt_Buyer_Bldr[0].FirstName]},

Thank you for engaging us to assist you with your property purchase.

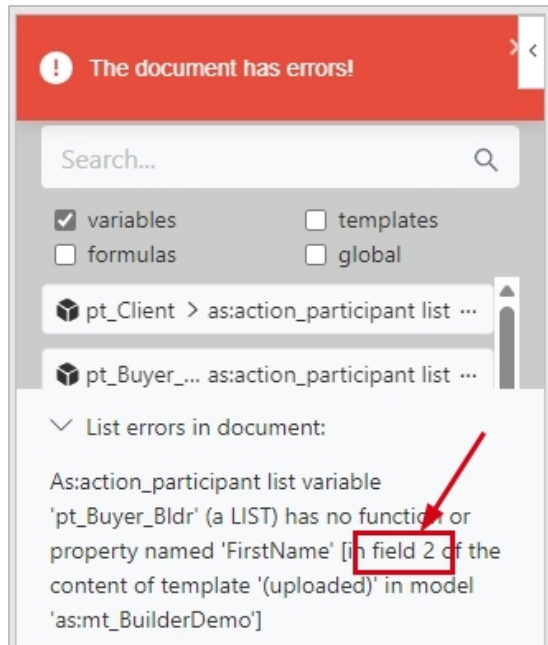
Please note the following details:

Property:	1872 Winwood Trace, Vineyard, KY 40356
Seller:	{[pt_Seller_Bldr[0].FirstName]} {[pt_Seller_Bldr[0].LastName]}
Purchase Price:	\$395,799
Deposit:	\$42,095

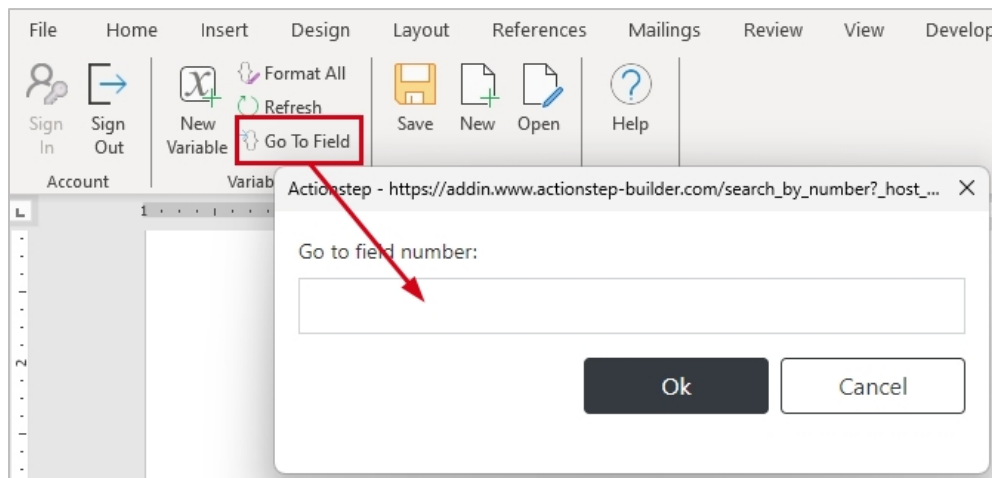
2. Click the **Save** button on the **Builder** ribbon to save your work.

NOTE: If you see an error message when you save the template, review each field to make sure the index marker is placed correctly. Additionally, make sure each field has an opening {[and closing]} field marker.

When you do get error messages, the Word Designer lists each specific error and includes a field number to help you find the field that needs to be corrected.



You can use the **Go to Field** button in the Builder ribbon to quickly locate the field. Please note: These error messages may not always match you to the exact field, but they should get you close to the field that is causing the error.



Lesson 8: Format a Text Variable

Frequently, you want variable text to be formatted a certain way. Builder allows you to format how a user's answer is merged in a document.

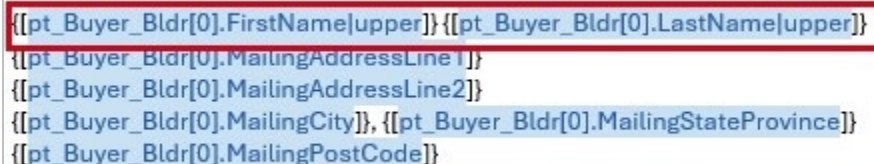
When you use the options on the ellipses icon to insert a variable, you can automatically include your formatting option. However, when inserting variables that are part of an object model (like a participant type or multi-row data collection), you must drag the variable to the template, which doesn't allow you to include formatting. It's easy to manually add it to the field, though.

Let's format the buyer's name in the address section.

To do this:

3. If you've closed the Property Purchase Letter, open it again. (See "Opening, Saving, and Closing the Tutorial Template" on page 5 for help.)
4. In the template, place your cursor immediately after the text **FirstName** in the **{{pt_Buyer_Bldr[0].FirstName}}** field.
5. Type the pipe character |, followed by the words **upper**, like this: (It is red for illustrative purposes only.)
{{pt_Buyer_Bldr[0].FirstName|upper}}
6. Repeat this step for **{{pt_Buyer_Bldr[0].LastName}}**.

Your template should look like this:



```
{{pt_Buyer_Bldr[0].FirstName|upper}}{{pt_Buyer_Bldr[0].LastName|upper}}  
{{pt_Buyer_Bldr[0].MailingAddressLine1}}  
{{pt_Buyer_Bldr[0].MailingAddressLine2}}  
{{pt_Buyer_Bldr[0].MailingCity}}, {{pt_Buyer_Bldr[0].MailingStateProvince}}  
{{pt_Buyer_Bldr[0].MailingPostCode}}
```

7. Now, when the letter is generated, the buyer's name will appear in UPPERCASE.
8. Click the **Save** button on the **Builder** ribbon to save your work.

NOTE: See the help article [About Formatting Answers in Builder](#) for a full list of formats.

Lesson 9: Replace Property Details with Variables

Just as you can use participant-type variables from Actionstep, you can also pull matter-specific data from an Actionstep data collection. In this tutorial, we reference two data collections—*Property Details* and *Special Conditions*.

NOTE: All data collection object models have names with an **as:dc_** prefix in Builder.

Data collections can be set up to merge either a single row or many rows of information. Since the *Property Details* data collection allows users to enter basic details about the property (like purchase price and deposit amount), it won't have multiple sets of answers. This means you don't need to use an index marker to indicate which record you want pulled from Actionstep.

To do this:

1. If you've closed the Property Purchase Letter, open it again. (See "Opening, Saving, and Closing the Tutorial Template" on page 5 for help.)
2. In the table in the template, delete the full address (*1872 Winwood Trace ...*) in the column after **Property**.
3. In the Word Designer, expand the **dc_PropertyDetails** variable.
4. Find the **PropertyAddress** variable and use your mouse to drag it to the cell.

Please note the following details:

Property:	{[dc_PropertyDetails.PropertyAddress]}
Seller:	{[pt_Seller_Bldr[0].FirstName]} {[pt_Seller_Bldr[0].LastName]}
Purchase Price:	\$395,799
Deposit:	\$42,095
Special Condition 1.	Land inspection report on the structural soundness of the property, to be completed by a licensed surveyor or a structural engineer or a person of your choice holding professional indemnity insurance. Due: November 29, 2024

5. Remove the numbers (but not the dollar signs) in both the **Purchase Price** and **Deposit** cells.
6. Using the same **dc_PropertyDetails** variable, find and insert these variables in their respective cells:
 - **PurchasePrice**
 - **Deposit**

Please note the following details:

Property:	{{dc_PropertyDetails.PropertyAddress}}
Seller:	{{pt_Seller Bldr[0].FirstName}}{{pt_Seller Bldr[0].LastName}}
Purchase Price:	\${{dc_PropertyDetails.PurchasePrice}}
Deposit:	\${{dc_PropertyDetails.Deposit}}
Special Condition 1.	Land inspection report on the structural soundness of the property, to be completed by a licensed surveyor or a structural engineer or a person of your choice holding professional indemnity insurance. Due: November 29, 2024

Since this data collection is "single-answer," you don't need to include any index markers in the fields.

7. Click **Save** in the **Builder** toolbar to save your work.

Lesson 10: Insert a List of Special Purchase Conditions

With the letter, you may need to include some special conditions that may affect the purchase/sale of the property. You will use the *Special Conditions* data collection to do this.

Since there may be any number of conditions, you'll ensure users can provide multiple answers. (This is different from the single-answer *Property Details* data collection you used in the previous lesson.)

This lesson is divided into three parts:

1. Adding the variables to the table
2. Preparing the table so that its rows can be repeated if there are multiple answers
3. Adding the *list* instruction to the table

NOTE: In the first column, you see the text *Special Condition 1.* and *Special Condition 2.* This text is inserted using a custom numbered list format that was specifically set up for this template. The list format includes the text "Special Condition". It has been left aligned to the left cell border. (You can search the Word help system for more information on creating customized numbered lists.)

Part 1: Adding the Variables to the Table

Let's add the special condition variables to the table.

To do this:

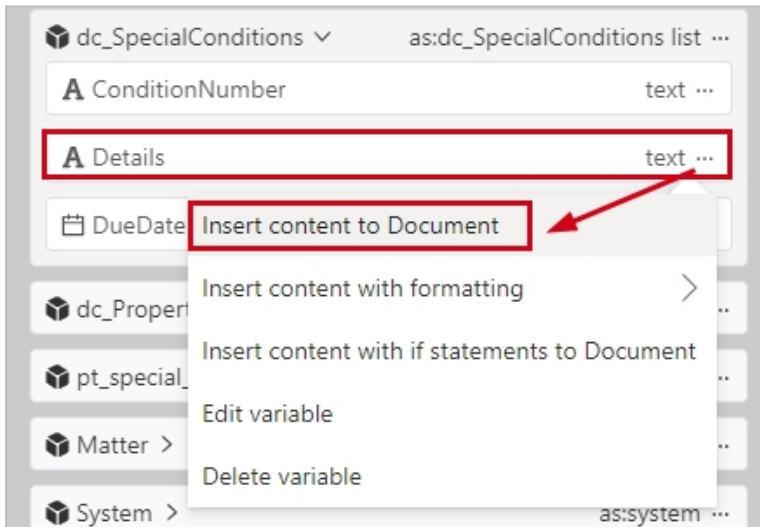
1. If you've closed the Property Purchase Letter, open it again. (See "Opening, Saving, and Closing the Tutorial Template" on page 5 for help.)
2. In the template table, use Word to delete the **Special Condition 2** row. (Specifically, click in the row and click the **Layout** tab in the Word ribbon. Then choose **Delete > Delete Rows.**)
3. In the **Special Condition 1** row, remove the description and due date in the second column.

Property:	{{dc_PropertyDetails.PropertyAddress}}
Seller:	{{pt_Seller_Bldr[0].FirstName}} {{pt_Seller_Bldr[0].LastName}}
Purchase Price:	\${{dc_PropertyDetails.PurchasePrice}}
Deposit:	\${{dc_PropertyDetails.Deposit}}
Special Condition 1.	

4. In that cell, insert your cursor.

NOTE: In previous lessons, when you inserted variables from a matter type, you included the object model name as well as an index marker to indicate a specific record to pull from Actionstep. In this lesson, you'll use a different method for including the object model name, which will create the potential for multiple answers. And since multiple answers can be entered, you will not need to use index markers.

5. In the Word Designer, expand **dc_SpecialConditions** object model.
6. Find the **Details** variable.
7. Click the ellipses icon for the variable and choose **Insert content to Document**.



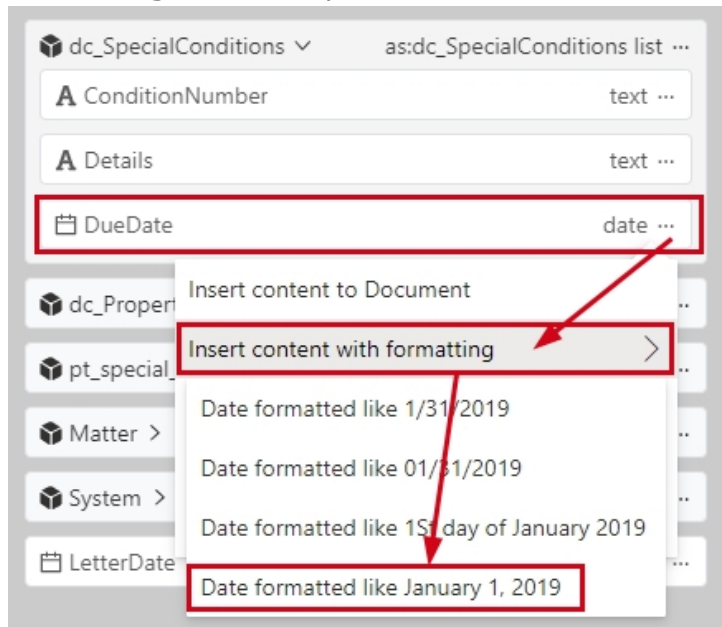
The variable is inserted in the template. (If bold formatting has been applied to the field, remove it.)

8. After the variable field you just inserted, press **Enter** to add a new line to the cell and type **Due date:** .

Property:	{{dc_PropertyDetails.PropertyAddress}}
Seller:	{{pt_Seller_Bldr[0].FirstName}} {{pt_Seller_Bldr[0].LastName}}
Purchase Price:	\${{dc_PropertyDetails.PurchasePrice}}
Deposit:	\${{dc_PropertyDetails.Deposit}}
Special Condition 1.	<div style="border: 1px solid red; padding: 2px;"> {{Details}} Due Date: </div>

9. Make sure your cursor appears after the **Due Date:** text.
10. In the Word Designer, find the **DueDate** variable listed under the **dc_SpecialConditions** object model.

11. Click the ellipses icon on the **DueDate** variable and choose **Insert content with formatting**, followed by **Date formatted like January 1, 2019**.



The variable is inserted after the **Due date** text on the second line in the cell.

12. If necessary, use Word's Font tools to remove the bold formatting from the `{[Details]}` field and make sure `{[DueDate]}` is bolded. This helps make sure the information stands out when someone is reviewing the letter.

Special Condition 1.	<code>{[Details]}</code> Due Date: {[DueDate]format: "MMMM D, YYYY"}
-----------------------------	--

13. Proceed to Part 2.

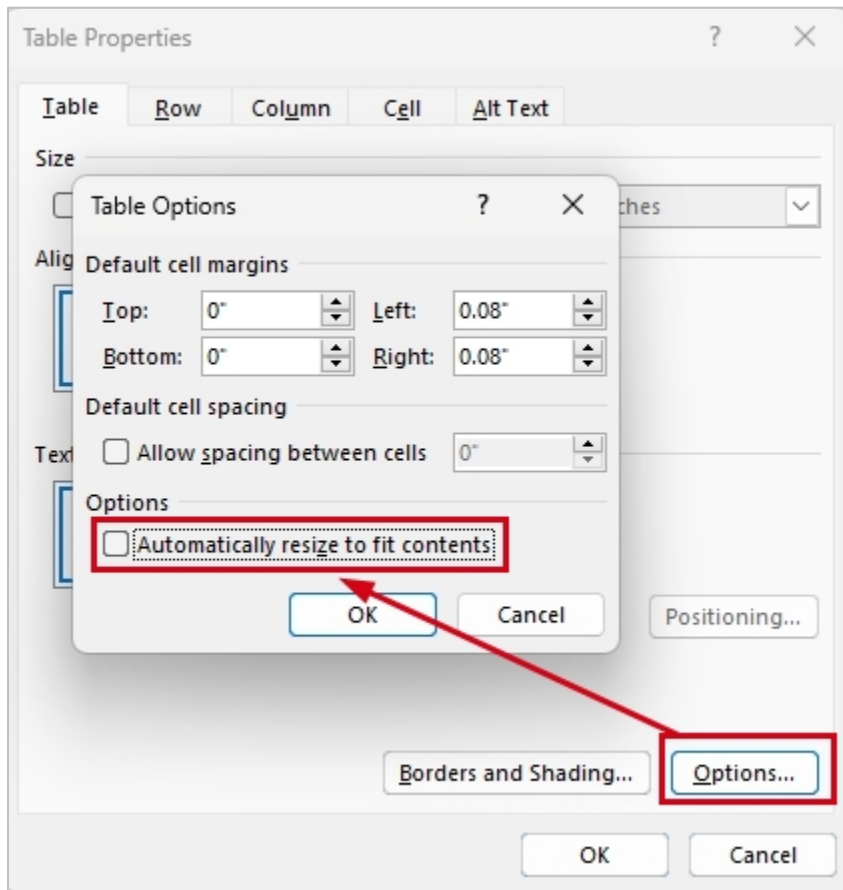
Part 2: Preparing the Table Row So It Can Be Repeated

To ensure the table stays formatted correctly after all the answers are entered, there are a few tweaks you'll make in Word.

To do this:

1. Right-click anywhere in the table and choose **Table Properties** from the shortcut menu. The Table Properties window appears.
2. On the **Table** tab, click **Options**. The Table Options window appears.

3. Clear **Automatically resize to fit contents**. This keeps Word from adjusting cell widths based on the text being inserted.



4. Click **OK** twice to save your work and close the Table Options and Properties windows.
5. Place your cursor anywhere in the **Special Condition 1** row.
6. Click the **Table Layout** tab in the Word toolbar.
7. In the **Merge** section of the ribbon, choose **Split Table**. This adds a blank space between the Special Condition row and the previous rows in the table. Doing this will allow you to repeat just this single row in the table if there is more than one condition.

Property:	{{[dc_PropertyDetails.PropertyAddress]}}
Seller:	{{[pt_Seller_Bldr[0].FirstName]}} {{[pt_Seller_Bldr[0].LastName]}}
Purchase Price:	\${[dc_PropertyDetails.PurchasePrice]}
Deposit:	\${[dc_PropertyDetails.Deposit]}
Special Condition 1.	{{[Details]}} Due Date: {[DueDate format: "MMMM D, YYYY"]}

8. Proceed to Part 3.

Part 3: Adding the List Instruction to the Table

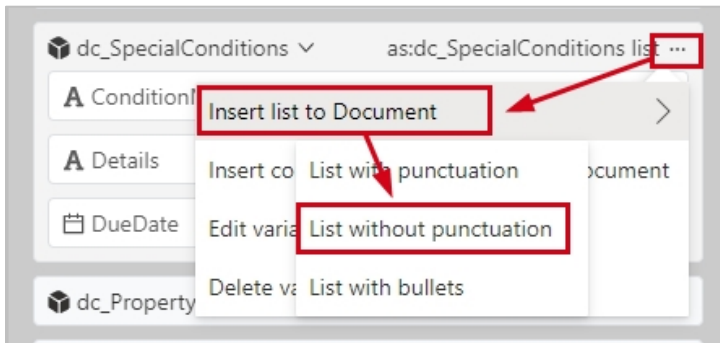
In this last set of steps, we will use a *list* instruction to repeat this row of the table in case the user has more than one special condition.

List instructions allow you to enter multiple answers for a single question. In this case, a user may have multiple special conditions that apply to the purchase.

Like variables, *list* instruction fields must be enclosed between curly and square brackets. Additionally, it matters where you place your opening and closing instructions. If the opening instruction is on its own line, the closing instruction must likewise be on its own line. If the opening instruction is within a paragraph, the closing instruction must also be in the same paragraph. (In these instances, a *line* refers to the space between Word paragraph markers.)

To do this:

1. Insert your cursor in the blank space you created between the last two rows of the table.
2. In the Word Designer, find the **dc_SpecialConditions** object model. Click the ellipses icon and choose **Insert list to Document**, followed by **List without punctuation**.



The *list* instruction is added to the blank space. You'll notice that the full instruction is added, including the first variable in the object model and the closing instruction.

Property:	{{[dc_PropertyDetails.PropertyAddress]}}
Seller:	{{[pt_Seller_Bldr[0].FirstName]}}{{[pt_Seller_Bldr[0].LastName]}}
Purchase Price:	\${[dc_PropertyDetails.PurchasePrice]}
Deposit:	\${[dc_PropertyDetails.Deposit]}
	{{[list dc_SpecialConditions]}}{{[ConditionNumber]}}{{[endlist]}}
Special Condition 1.	{{[Details]}}
	Due date: {{[DueDate format: "MMMM D, YYYY"]}}

3. Delete the **ConditionNumber** field.
4. Select the **{{[endlist]}}** instruction and move it to the blank line below the table. (You can use Word's Cut and Paste options to do this.) Make sure there's a blank line

between `{{endlist}}` and the *Tenancy* heading.

Property:	<code>{{dc_PropertyDetails.PropertyAddress}}</code>
Seller:	<code>{{pt_Seller_Bldr[0].FirstName}} {{pt_Seller_Bldr[0].LastName}}</code>
Purchase Price:	<code>\${{dc_PropertyDetails.PurchasePrice}}</code>
Deposit:	<code>\${{dc_PropertyDetails.Deposit}}</code>
<code>{{list dc_SpecialConditions}}</code>	
Special Condition 1.	<code>{{Details}}</code>
	Due Date: <code>{{DueDate format: "MMMM D, YYYY"}}</code>
<code>{{endlist}}</code>	
Tenancy	
As per the contract, the seller has advised that the property has a tenancy that ends before the	

5. Click **Save** in the Builder ribbon to save your changes.

Your template should now look like this:



Reliable Law

LEXINGTON, KY

{{LetterDate|format: "MMMM D, YYYY"}}

{{pt_Buyer_Bldr[0].FirstName|upper}} {{pt_Buyer_Bldr[0].LastName|upper}}
{{pt_Buyer_Bldr[0].MailingAddressLine1}}
{{pt_Buyer_Bldr[0].MailingAddressLine2}}
{{pt_Buyer_Bldr[0].MailingCity}}, {{pt_Buyer_Bldr[0].MailingStateProvince}}
{{pt_Buyer_Bldr[0].MailingPostCode}}

PURCHASE OF 1872 WINWOOD TRACE

Dear {{pt_Buyer_Bldr[0].FirstName}},

Thank you for engaging us to assist you with your property purchase.

Please note the following details:

Property:	{{dc_PropertyDetails.PropertyAddress}}
Seller:	{{pt_Seller_Bldr[0].FirstName}} {{pt_Seller_Bldr[0].LastName}}
Purchase Price:	\${{dc_PropertyDetails.PurchasePrice}}
Deposit:	\${{dc_PropertyDetails.Deposit}}

{{list dc_SpecialConditions}}

Special Condition 1.	{{Details}} Due Date: {{DueDate format: "MMMM D, YYYY"}}
-----------------------------	--

{{endlist}}

Tenancy

As per the contract, the seller has advised that the property has a tenancy that ends before the settlement date.

Fees and Costs

Our fees and costs are as follows:

- Fixed Professional Fee: \$2300
- Property Details Search: \$825

Lesson 11: Use a Selection Variable to Create a List of Possible Fees

In this lesson, we'll cover how to use a selection variable to provide a list of predefined fees and costs users can apply to the purchase. The letter will then include the total of all those fees.

There are two parts to completing this lesson:

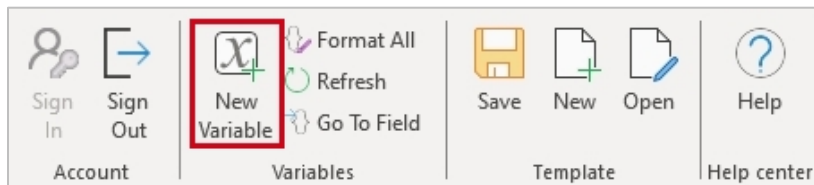
1. Creating the selection variable
2. Inserting it in the template.

Part 1: Create the Selection Variable

Selection variables allow you to present a list of options to users. Depending on how you set up the selection, users can either choose one or multiple answers. These options can be displayed as multi-select check boxes, single-select radio buttons, drop-down lists, and so forth.

To do this:

1. If you've closed the Property Purchase Letter, open it again. (See "Opening, Saving, and Closing the Tutorial Template" on page 5 for help.)
2. View the **Builder** ribbon and click **New Variable**.



The New Variable window appears.

3. Choose **List of** and then choose **Selection** from the drop-down list. (Choosing **List of** will let you include both the description and the amount of the fees in the letter.)
4. Name the variable **StandardFees**.

5. In the **Question prompt** field, enter the text **Select the fees that apply to this purchase**. The New Variable window should look like this:

The screenshot shows a web browser window with the URL `https://addin.builder.actionstep.com/variable?_host_Info=Wo...`. The page title is "Actionstep". The main content is a form titled "New Variable in Model". The form has the following fields and controls:

- New Variable in Model:** A text input field containing "as:mt_BuilderDemo".
- Type:** Two radio buttons: "Single" (unselected) and "List of" (selected). To the right of the "List of" radio button is a text input field containing "selection".
- VARIABLE NAME:** A text input field containing "StandardFees".
- QUESTION PROMPT:** A text input field containing "Select the fees that apply to this purchase".
- Buttons:** "Ok" and "Cancel" buttons at the bottom.

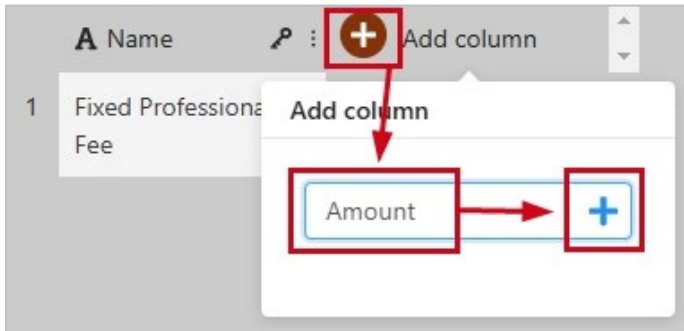
6. Click **OK**. The variable is created.
7. Click the ellipses icon for the **StandardFees** variable and choose **Edit Variable**. A dialog appears with options to edit the variable.

The screenshot shows a web browser window with the URL `https://addin.builder.actionstep.com/variable?_host_Info=Wo...`. The page title is "Actionstep". The main content is a form titled "Edit Variable". The form has the following fields and controls:

- VARIABLE NAME:** A text input field containing "StandardFees".
- TYPE:** A text input field containing "list of selection values".
- QUESTION PROMPT:** A text input field containing "Select the fees that apply to this purchase". To the right of the text input field is a checkbox labeled "Leave Blank" which is unchecked.
- RELEVANCE (CONDITION):** A text input field containing "automatic".
- QUESTION HELP:** A text input field.
- SELECT FROM:** Three radio buttons: "An option listed below" (selected), "A table" (unselected), and "User data" (unselected).
- STYLE:** A dropdown menu with "checkboxes" selected.
- OPTION TEMPLATE:** A text input field.
- Buttons:** "Ok" and "Cancel" buttons at the bottom.

8. In the **Select from** group, select **An option listed below**.
9. Click the **Style** drop-down list and choose **Checkboxes**. This allows users to choose as many options as they need.

10. In the table that appears, enter **Fixed Professional Fee** in the **Name** column of row 1.
11. Click the **Add column** icon.
12. Enter **Amount** in the **Column name** field and click the add icon.



This creates a second column in the table called *Amount*.

13. Enter **2300** in row 1 of this column.

	A Name	⌘ : A Amount	⌘ + Add column
1	Fixed Professional Fee	2300	

14. Click **Add row**, and in row 2, enter **Property Details Search** and **825.50** in the respective columns.
15. Press **Enter** to create a third row, and in it, enter **Settlement Fee** and **200** in the respective columns. Your table should look like this:

	A Name	⌘ : A Amount	⌘
1	Fixed Professional Fee	2300	
2	Property Details Search	825.50	
3	Settlement Fee	200	

TIP: If you add an extra row that you don't need, click on the row number and choose **Delete** to remove it.

16. In the **Option Template** field (located above this table), enter the following:
{{Name}} (\${{Amount}}).

SELECT FROM

☒ Options defined below
☐ A table or query
☐ User data (list expression)

STYLE

checkboxboxes

OPTION TEMPLATE

{{Name}} (\${{Amount}})

	A Name	A Amount	
1	Fixed Professional Fee	2300	
2	Property Details Search	825.50	
3	Settlement Fee	200	

NOTE: The **Option Template** field is an advanced setting that ensures users will see both the description and the amount for each possible fee as part of the question in the interview. Otherwise, only the *Description* OR the *Amount* will be displayed for the user to choose from.

Your variable setup should look like this:

VARIABLE NAME

StandardFees

TYPE

list of **selection** values

QUESTION PROMPT

☐ Leave Blank

Select the fees that apply to this purchase

RELEVANCE (CONDITION)

automatic

QUESTION HELP

SELECT FROM

☒ An option listed below
☐ A table
☐ User data

STYLE

checkboxboxes

OPTION TEMPLATE

{{Name}} (\${{Amount}})

	A Name	A Amount	
1	Fixed Professional Fee	2300	
2	Property Details Search	825.50	
3	Settlement Fee	200	

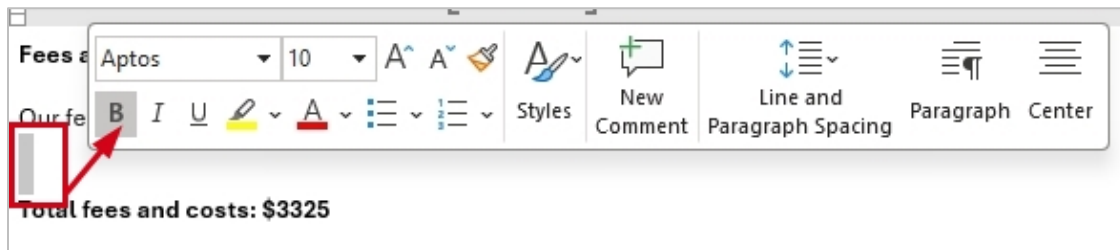
17. Click **OK** to save the selection variable.
18. Click the **Save** button on the **Builder** ribbon to save your work.

Part 2: Insert the Selection Variable

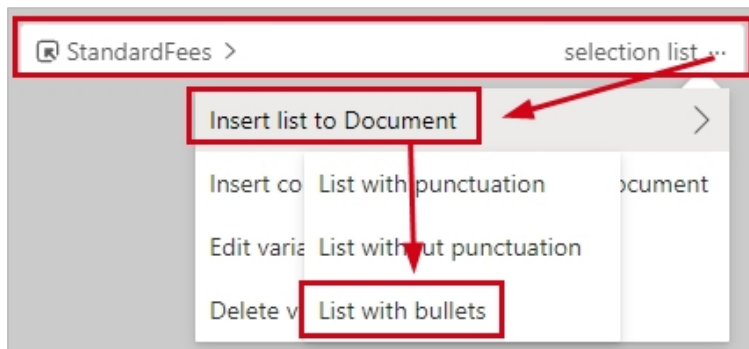
In these next steps, you'll insert the selection variable so that both the description and amount are included in the letter. (This is why you created the variable as a list.)

To do this:

1. In the **Fees and Costs** section of the letter, delete the bullet list under the sentence that says *Our fees and costs are as follows*.
2. Make sure there are two blank lines between the *Our fees and costs ...* sentence and the *Total fees and costs...* sentence. Also, make sure those blank lines do not have bold formatting applied to them. (You can highlight the lines with your cursor and click the **Bold** icon to deselect it.)



3. In the template, place your cursor on the blank line immediately after the text *Our fees and costs are as follows*.
4. In the Word Designer, find the **StandardFees** selection list and click its ellipses icon.
5. Choose **Insert list to Document** and choose **List with bullets** as your formatting option.



The full instruction is added to the document, but only the field for the first column in the selection variable is included.

Fees and Costs

Our fees and costs are as follows:

{{list StandardFees}}

- {{Name}}

{{endlist}}

Total fees and costs: \$3325

You also need to include the **Amount** variable.

6. After the **Name** field, add a colon, a space character, and a dollar sign, like this:

Fees and Costs

Our fees and costs are as follows:

{{list StandardFees}}

- {{Name}}: \$

{{endlist}}

Total fees and costs: \$3325

7. Place your cursor after the dollar sign.
8. In the Word Designer, click the arrow to expand the **StandardFees** selection list variable.
9. Click the ellipses icon for the **Amount** variable and choose **Insert content to Document**.
10. When you are finished, the instruction should look like this:

Fees and Costs

Our fees and costs are as follows:

{{list StandardFees}}

- {{Name}}: \${{Amount}}

{{endlist}}

Total fees and costs: \$3325

11. Click **Save** on the **Builder** ribbon to save your work.

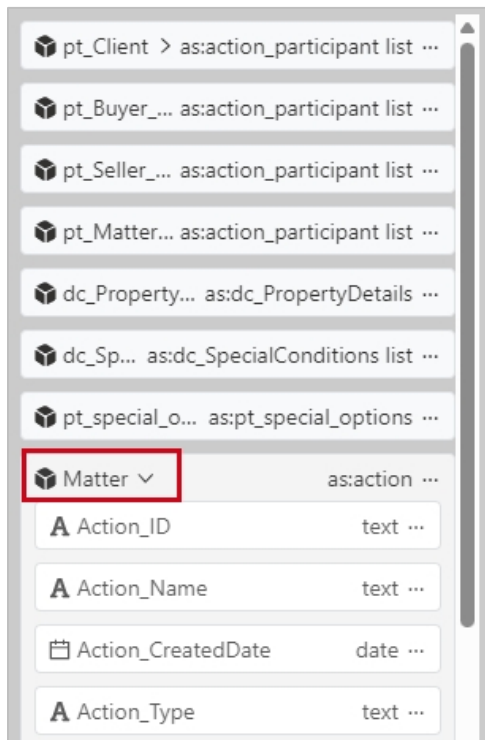
Looking at the template, you can see that we need to include a formula that sums and shows the selected fees in the letter. We'll cover these instructions in "Lesson 17: Create a Formula for Calculating Fees and Costs". For now, proceed to Lesson 12.

Lesson 12: Include Matter and Attorney Information

Two of the last variables you will insert using the Word Designer are the matter name (near the top of the letter) and the attorney's name (in the signature).

To insert the matter name:

1. If you've closed the Property Purchase Letter, open it again. (See "Opening, Saving, and Closing the Tutorial Template" on page 5 for help.)
2. Near the top of the template, highlight the text *Purchase of 1872 Winwood Trace*. (Select only the title and not any spaces or hidden paragraph marks after the text.)
3. In the Word Designer, find and expand the **Matter** object model.



4. Click the ellipses icon on the **Action_Name** variable and choose **Insert content with formatting**, followed by **Upper Case**. The variable is inserted into the template.



5. Click **Save** on the **Builder** ribbon to save your work.

The final variable is the attorney's signature, located near the bottom of the letter. Since this is a participant type variable, the variable field will need to include the participant type object model designation, and you'll need to include an index marker indicating which specific record to pull from the participant type. (This is the same process you followed for the Buyer and Seller variables.)

To insert the attorney's name:

1. In the document, highlight and delete the text *Matthew P. Sinclair*.
2. In the Word Designer, find and expand the **pt_Matter_Lawyer_Bldr** object model.
3. Click on and drag **FirstName** to the document where the attorney's first name should be.
4. Click on and drag **LastName** to the document there the attorney's last name should be. Make sure there's a space separating both fields.
5. For both fields, add an index marker by typing a **[0]** between **_Bldr** and **.FirstName** and **.LastName**, like this:

Our team looks forward to assisting you.

Regards,

{{[pt_Matter_Lawyer_Bldr[0].FirstName]}} {[pt_Matter_Lawyer_Bldr[0].LastName]}

6. Click **Save** on the **Builder** ribbon to save your work.

Your template should look like this:



Reliable Law

LEXINGTON, KY

{{LetterDate|format: "MMMM D, YYYY"}}

{{pt_Buyer_Bldr[0].FirstName|upper}} {{pt_Buyer_Bldr[0].LastName|upper}}
{{pt_Buyer_Bldr[0].MailingAddressLine1}}
{{pt_Buyer_Bldr[0].MailingAddressLine2}}
{{pt_Buyer_Bldr[0].MailingCity}}, {{pt_Buyer_Bldr[0].MailingStateProvince}}
{{pt_Buyer_Bldr[0].MailingPostCode}}

{{Matter.Action_Name|upper}}

Dear {{pt_Buyer_Bldr[0].FirstName}},

Thank you for engaging us to assist you with your property purchase.

Please note the following details:

Property:	{{dc_PropertyDetails.PropertyAddress}}
Seller:	{{pt_Seller_Bldr[0].FirstName}} {{pt_Seller_Bldr[0].LastName}}
Purchase Price:	\${{dc_PropertyDetails.PurchasePrice}}
Deposit:	\${{dc_PropertyDetails.Deposit}}
[[list dc_SpecialConditions]]	
Special Condition 1.	[[Details]] Due Date: {{DueDate format: "MMMM D, YYYY"}}
[[endlist]]	

Tenancy

As per the contract, the seller has advised that the property has a tenancy that ends before the settlement date.

Fees and Costs

Our fees and costs are as follows:

[[list StandardFees]]

- {{Name}}: \${{Amount}}

[[endlist]]

Total fees and costs: \$3325

Our team looks forward to assisting you.

Regards,

{{pt_Matter_Lawyer_Bldr[0].FirstName}} {{pt_Matter_Lawyer_Bldr[0].LastName}}

Lesson 13: Use a Basic If Instruction to Make Text Optional

Reviewing the letter so far, you might notice there are some parts of the letter that might not always be applicable or needed. You can use conditional *if* instructions to indicate whether a section of text should only be used when a certain condition exists.

Like variables and *list* instructions, *if* instruction fields must be enclosed between curly and square brackets. Additionally, it matters where you place your opening and closing instructions. If the opening instruction is on its own line, the closing instruction must likewise be on its own line. If the opening instruction is within a paragraph, the closing instruction must also be in the same paragraph. (In these instances, a line refers to the space between Word paragraph markers.)

Reviewing the address block at the top of the letter, there's a second line of an address. However, not all clients require this second line. In this lesson, you'll make this line optional. Specifically, you'll test whether the user provides an answer to this question, and if they do, the address will be included. Otherwise, the field will be removed and no second address line will be shown in the letter.

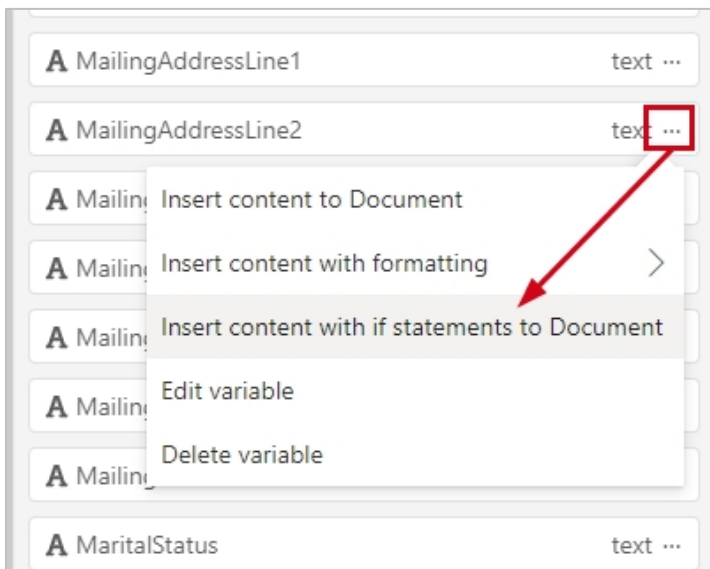
To do this:

1. If you've closed the Property Purchase Letter, open it again. (See "Opening, Saving, and Closing the Tutorial Template" on page 5 for help.)
2. In the Word template, place your cursor before the *MailingAddressLine2* variable field.
3. In the Word Designer, find and expand the **pt_Buyer_Bldr** object variable.



4. Find the **MailingAddressLine2** variable and click the ellipses icon next to the variable name.

5. Choose **Insert content with if statements to Document**.



The opening and closing instructions are added to the template.



6. Using Word's Cut and Paste options, arrange the variable and instruction fields so they look like this:



Each field should be on its own line. And since *MailingAddressLine2* is part of a participant type object model (which we've learned are lists by default), you need to include an index marker to indicate which record to pull from Actionstep.

7. In the opening **[[if MailingAddressLine2]]** instruction, add the following text after the word **if**:

pt_Buyer_Bldr[0].

Your template should look like this:

```
{[pt_Buyer_Bldr[0].FirstName|upper]} {[pt_Buyer_Bldr[0].LastName|upper]}  
{[pt_Buyer_Bldr[0].MailingAddressLine1]}  
→ {[if pt_Buyer_Bldr[0].MailingAddressLine2]}  
{[pt_Buyer_Bldr[0].MailingAddressLine2]}  
{[endif]}  
{[pt_Buyer_Bldr[0].MailingCity]}, {[pt_Buyer_Bldr[0].MailingStateProvince]} |  
{[pt_Buyer_Bldr[0].MailingPostCode]}
```

8. Click **Save** on the **Builder** ribbon to save your work.

Lesson 14: Include Different Versions of a Paragraph

The Purchase Letter includes a section on whether the property being purchased currently has tenants and how that will affect the purchase. In this lesson, you will use two *if* instructions to first, determine whether to include the paragraph on tenancy, and second, indicate which type of tenancy it is. To help you test these conditions, you will use a *selection* variable.

This lesson includes four parts:

1. Adding the alternate versions of text
2. Creating the selection variable that will be used to determine which text to include
3. Inserting the *if* instruction that determines which paragraph will be inserted
4. Inserting another instruction that, if the property does have a tenant, inserts what the status of the tenant will be at settlement

Part 1: Adding the Alternate Versions of Text to the Tenancy Clause

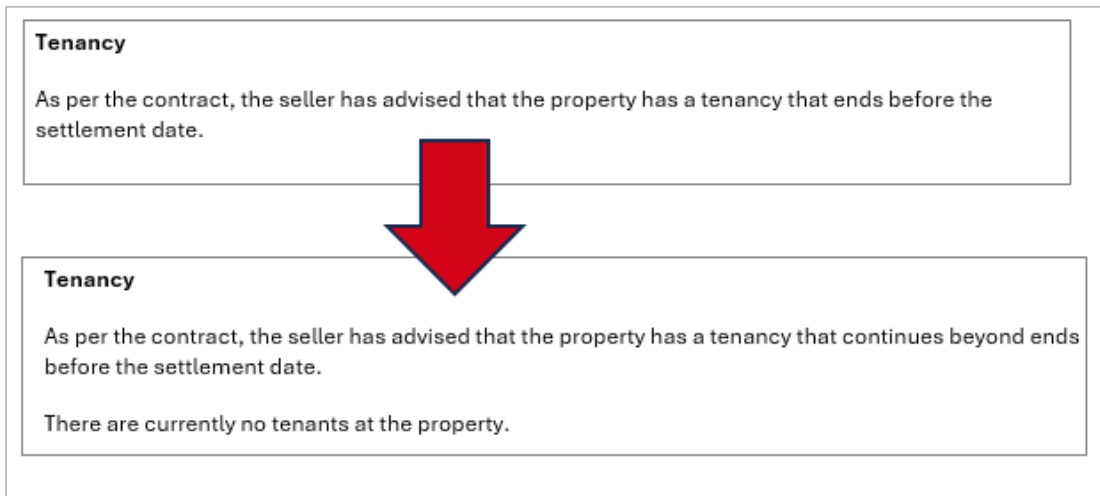
The *Tenancy* section in this letter currently includes language that there is a tenancy but that it will end before settlement. However, this clause also needs to include alternate language that indicates tenancy will continue after settlement, or that there are no tenants at the property currently. In this part of the lesson, you'll add these variations of the text.

To do this:

1. If you've closed the Property Purchase Letter, open it again. (See "Opening, Saving, and Closing the Tutorial Template" on page 5 for help.)
2. In the template, replace the current text in the *Tenancy* section with the following:

As per the contract, the seller has advised that the property has a tenancy that continues beyond ends before the settlement date.

There are currently no tenants at the property.



3. Click **Save** on the **Builder** ribbon to save your work.

Part 2: Creating the Variable to Be Used in the If Expression

In Part 2 of this lesson, you will create a selection variable that tests for the conditions covered in the letter, specifically 1) if there is a tenant at the property, 2) whether the tenancy will continue or end at settlement, or 3) if there is no tenancy. Then, in Parts 3 and 4 of this lesson, you will create a series of *if / else* instructions based on these conditions to ensure the correct text is inserted.

To do this:

1. In the Builder toolbar, click **New variable**. The New Variable window appears.
2. Make sure **Single** is selected and choose **Selection** from the drop-down list.
3. Enter **Tenancy** in the **Variable Name** field.

4. Enter **Is a tenancy noted on the contract?** in the **Question Prompt** field. Your variable editor should look like this:

New Variable in Model

as:mt_BuilderDemo

☒ Single
☐ List of selection

VARIABLE NAME

Tenancy

QUESTION PROMPT

Is a tenancy noted on the contract?

Ok Cancel

5. Click **OK**. The variable is created.
6. In the Word Designer, click the ellipses icon next to the new **Tenancy** variable and choose **Edit Variable**. A second window is displayed so you can choose your selection variable options.
7. In the **Select from** list, choose **An option listed below**.
8. Click the **Style** drop-down list and choose **Radiobuttons**. This will display the choices you'll define as single-selection options for the user.
9. In the first row of the **Name** column, enter the text **Yes, and tenancy continues past settlement**.
10. Click the plus icon in the second column and enter the text **Value**. Then click the plus sign to add it.

Name	Value
1 Yes, and tenancy continues past settlement	

11. In the **Value** column of the first row, enter the text **Yes1**.
12. Press **Enter** twice to add a second and third row to the table.
13. Add these options to each new row in the list:

Row 2	Yes, but tenants are leaving before settlement	Yes2
Row 3	No, there are currently no tenants	No

Your variable setup should look like this:

VARIABLE NAME		TYPE																	
<input type="text" value="Tenancy"/>		<input type="text" value="single selection value"/>																	
QUESTION PROMPT	<input type="checkbox"/> Leave Blank	RELEVANCE (CONDITION)																	
<input type="text" value="Is a tenancy noted on the contract?"/>		<input type="text" value="automatic"/>																	
QUESTION HELP																			
<input type="text"/>																			
SELECT FROM	STYLE	OPTION TEMPLATE																	
<input checked="" type="radio"/> An option listed below <input type="radio"/> A table <input type="radio"/> User data	<input type="text" value="radiobuttons"/>	<input type="text"/>																	
<table border="1"> <thead> <tr> <th></th> <th>A Name</th> <th>A Value</th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Yes, and tenancy cont</td> <td>Yes1</td> <td></td> </tr> <tr> <td>2</td> <td>Yes, but tenants are le</td> <td>Yes2</td> <td></td> </tr> <tr> <td>3</td> <td>No, there are currentl</td> <td>No</td> <td></td> </tr> </tbody> </table>					A Name	A Value		1	Yes, and tenancy cont	Yes1		2	Yes, but tenants are le	Yes2		3	No, there are currentl	No	
	A Name	A Value																	
1	Yes, and tenancy cont	Yes1																	
2	Yes, but tenants are le	Yes2																	
3	No, there are currentl	No																	

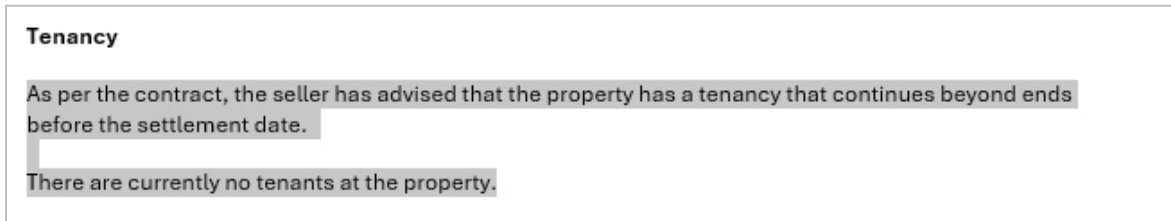
14. Click **OK** to save the selection variable.

Part 3: Inserting the If and Else If Expressions

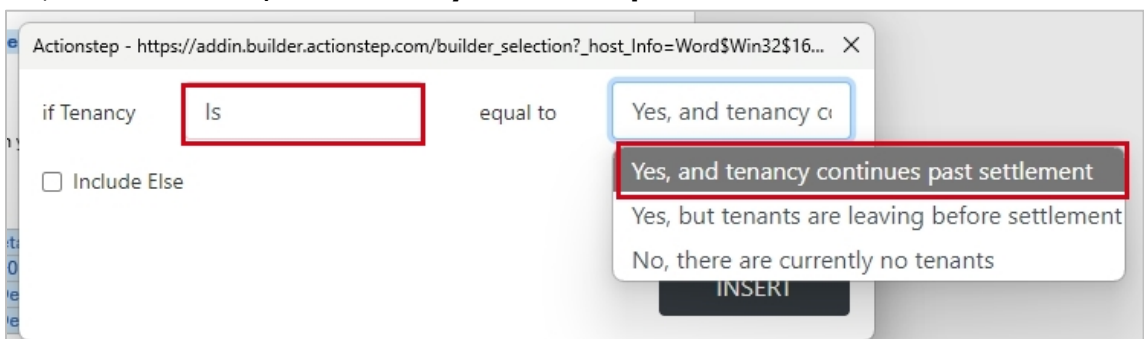
Now you will use a series of conditional instructions to choose which paragraph to include—tenancy or no tenancy.

To do this:

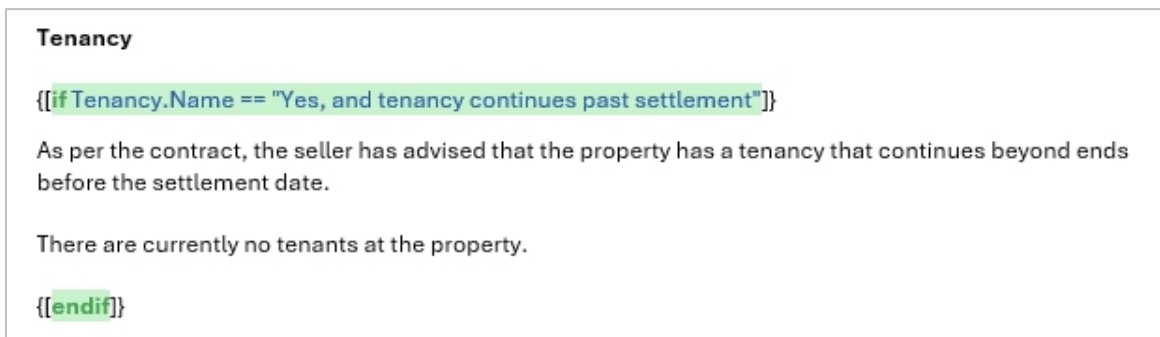
1. In the template, highlight all the text in the *Tenancy* clause.



2. In the Word Designer, click the ellipses icon next to the **Tenancy** variable and choose **Insert content with if statements to Document**. Another window with options is displayed.
3. In the first drop-down list, make sure **Is** is selected, and in the **Equal to** drop-down list, make sure **Yes, and tenancy continues past settlement** is selected.



4. Click **Insert**. The instructions are inserted in the template.



Since the first paragraph should be inserted regardless of whether the tenancy will continue or end at settlement, we need to add an additional condition to the opening *if* instruction.

5. Place your cursor at the end of the opening *if* field. It should be inserted after the field markers.



6. In the Word Designer, click the ellipses icon next to **Tenancy** and choose **Insert content with if statements to Document**.

7. In the window that appears, make sure **Is** is selected for the first field and **Yes, but tenants are leaving before settlement** is selected in the **Equal to** drop-down list.

if Tenancy Is equal to Yes, but tenants an

8. Click **Insert**. The second instruction is added to the template.

Tenancy

```

{{if Tenancy.Name == "Yes, and tenancy continues past settlement"}}{{if Tenancy.Name == "Yes, but
tenants are leaving before settlement"}}{{endif}}

```

To ensure the instruction works, we want to combine both instructions into a single "or" statement.

9. Highlight the **}} {{** characters between the two instructions and replace them with **||**. (Two pipe characters is the equivalent of an OR statement.)

Tenancy

```

{{if Tenancy.Name == "Yes, and tenancy continues past settlement"}}|| if Tenancy.Name == "Yes, but
tenants are leaving before settlement"}}{{endif}}

```

10. In the second instruction you just inserted, delete the word **if**.
11. Delete the **{{endif}}** field immediately following the second instruction.
12. The Tenancy clause should now look like this:

Tenancy

```

{{if Tenancy.Name == "Yes, and tenancy continues past settlement"}}|| Tenancy.Name == "Yes, but tenants
are leaving before settlement"}}

```

As per the contract, the seller has advised that the property has a tenancy that continues beyond ends before the settlement date.

There are currently no tenants at the property.

```

{{endif}}

```

13. Place your cursor on the blank line before the paragraph that says *There are currently no tenants at the property*.
14. In the Word Designer, click the ellipses icon next to **Tenancy** and choose **Insert content with if statements to Document**.
15. In the window that appears, the statement should be:

if Tenancy Is equal to No, there are curre

16. Click **Insert**. The instruction is added to the template.

```
As per the contract, the seller has advised that the property has a tenancy that continues beyond ends before the settlement date.  
{{if Tenancy.Name == "No, there are currently no tenants"}}{{endif}}  
There are currently no tenants at the property.  
  
{{endif}}
```

17. Delete the **endif** instruction immediately following the instruction you just added.

```
As per the contract, the seller has advised that the property has a tenancy that continues beyond ends before the settlement date.  
{{if Tenancy.Name == "No, there are currently no tenants"}}  
There are currently no tenants at the property.  
  
{{endif}}
```

This last “no tenants” instruction should be processed only if the first two conditions (“yes there are tenants...”) isn’t true. To do this, you will modify the “no tenants” instruction to include the *else* operator.

18. In the “no tenants” instruction, add the word **else** immediately before the **if**. The instruction should look like this:

```
As per the contract, the seller has advised that the property has a tenancy that continues beyond ends before the settlement date.  
{{elseif Tenancy.Name == "No, there are currently no tenants"}}  
There are currently no tenants at the property.  
  
{{endif}}
```

The full Tenancy clause should look like this:

```
Tenancy  
  
{{if Tenancy.Name == "Yes, and tenancy continues past settlement" || Tenancy.Name == "Yes, but tenants are leaving before settlement"}}  
  
As per the contract, the seller has advised that the property has a tenancy that continues beyond ends before the settlement date.  
{{elseif Tenancy.Name == "No, there are currently no tenants"}}  
There are currently no tenants at the property.  
  
{{endif}}
```

19. Click **Save** on the **Builder** ribbon to save your work.

NOTE: If you receive errors when saving, check to make sure each instruction is followed by a paragraph break and not a line break. You can use Word's Show/Hide Paragraph Marks to check. Remember, if an opening instruction is its own paragraph, the closing instruction must also be its own paragraph.

```
As per the contract, the seller has advised that the property has a tenancy that continues beyond ends before the settlement date.¶  
{{else if Tenancy.Name=="No, there are currently no tenants"}}¶  
There are currently no tenants at the property.¶  
{{endif}}¶
```

```
As per the contract, the seller has advised that the property has a tenancy that continues beyond ends before the settlement date.¶  
{{else if Tenancy.Name=="No, there are currently no tenants"}}¶  
There are currently no tenants at the property.¶  
{{endif}}¶
```

Part 4: Make Text Within the Paragraph Conditional

The final part of automating this Tenancy clause is to use the same selection variable to insert the correct type of tenancy. In this lesson, however, we'll use the **Value** from the options to test the conditions.

To do this:

1. In the paragraph starting *As per the contract*, highlight the text *continues beyond* (including the space immediately after the word *beyond*).
2. In the Word Designer, click the arrow next to the **Tenancy** variable. The list is expanded to show individual options.
3. Click the ellipses icon next to **Value** and choose **Insert content with if statements to Document**. The instruction is added to the template.

Since the condition relies on a specific selection of *Value*, we need to add that selection to the *if* instruction.

4. In the **Tenancy.Value** field, place your cursor immediately after the word **Value** and enter the following text:

== "Yes1"

The instruction should look like this:

```
As per the contract, the seller has advised that the property has a tenancy that {{if  
Tenancy.Value=="Yes1"}}
```

5. Place your cursor before the text **continues beyond** and press **Backspace**. This moves the text back into the previous paragraph.
6. Do the same for both the **{[endif]}** and **ends before the settlement date** lines. When you're finished, all the text in the Tenancy clause will be in the same paragraph again.

As per the contract, the seller has advised that the property has a tenancy that {[if
Tenancy.Value=="Yes1"]} continues beyond {[endif]}ends before the settlement date.

7. Using Word's Cut and Paste functions, select and "cut" the **{[endif]}** field and paste it *after* the word **before**.
8. Using Word's Copy and Paste functions, select and copy the **{[if Tenancy.Value == "Yes1"]}** field you inserted in Steps 3-4 and paste it *before* the text **ends before**.
9. In this field, add the word **else** immediately before **if** in the instruction.
10. Edit **Yes1** to say **Yes2**.

When you are finished, the Tenancy clause should look like this.

Tenancy

{[if Tenancy.Name == "Yes, and tenancy continues past settlement"|| Tenancy.Name == "Yes, but tenants are leaving before settlement"]}

As per the contract, the seller has advised that the property has a tenancy that {[if
Tenancy.Value=="Yes1"]} continues beyond {[else if Tenancy.Value=="Yes2"]} ends before {[endif]} the settlement date.

{[else if Tenancy.Name == "No, there are currently no tenants"]}
There are currently no tenants at the property.
{[endif]}

Pay close attention to empty spaces before and after the instructions. This will ensure the appropriate phrases will be merged with the correct spacing.

11. Click **Save** on the **Builder** ribbon to save your work.

Your template should look like this:



Reliable Law

LEXINGTON, KY

{{LetterDate|format: "MMMM D, YYYY"}}

{{pt_Buyer_Bldr[0].FirstName|upper}} {{pt_Buyer_Bldr[0].LastName|upper}}
{{pt_Buyer_Bldr[0].MailingAddressLine1}}
{{pt_Buyer_Bldr[0].MailingAddressLine2}}
{{pt_Buyer_Bldr[0].MailingAddressLine3}}
{{pt_Buyer_Bldr[0].MailingCity}}, {{pt_Buyer_Bldr[0].MailingStateProvince}}
{{pt_Buyer_Bldr[0].MailingPostCode}}

{{Matter.Action_Name|upper}}

Dear {{pt_Buyer_Bldr[0].FirstName}},

Thank you for engaging us to assist you with your property purchase.

Please note the following details:

Property:	{{dc_PropertyDetails.PropertyAddress}}
Seller:	{{pt_Seller_Bldr[0].FirstName}} {{pt_Seller_Bldr[0].LastName}}
Purchase Price:	\${{dc_PropertyDetails.PurchasePrice}}
Deposit:	\${{dc_PropertyDetails.Deposit}}
Special Condition 1. {{Details}}	
Due Date: {{DueDate format: "MMMM D, YYYY"}}	

Tenancy

{{if Tenancy.Name == "Yes, and tenancy continues past settlement" || Tenancy.Name == "Yes, but tenants are leaving before settlement"}}

As per the contract, the seller has advised that the property has a tenancy that {{if Tenancy.Value=="Yes1"}} continues beyond{{elseif Tenancy.Value=="Yes2"}} ends before{{endif}} the settlement date.

{{elseif Tenancy.Name == "No, there are currently no tenants"}}

There are currently no tenants at the property.

{{endif}}

Fees and Costs

Our fees and costs are as follows:

{{list StandardFees}}

- {{Name}}: \${{Amount}}

{{endlist}}

Wills | Estates | Employment | Property | Commercial | Administrative
Lexington | Louisville | www.ReliableLaw.com

Total fees and costs: \$3325

Our team looks forward to assisting you.

Regards,

{{pt_Matter_Lawyer_Bldr[0].FirstName}} {{pt_Matter_Lawyer_Bldr[0].LastName}}

Wills | Estates | Employment | Property | Commercial | Administrative
Lexington | Louisville | www.ReliableLaw.com

Tip: You can click the **Format All** icon in the Builder toolbar and it will update the fields you've manually adjusted with the right colors and highlighting.

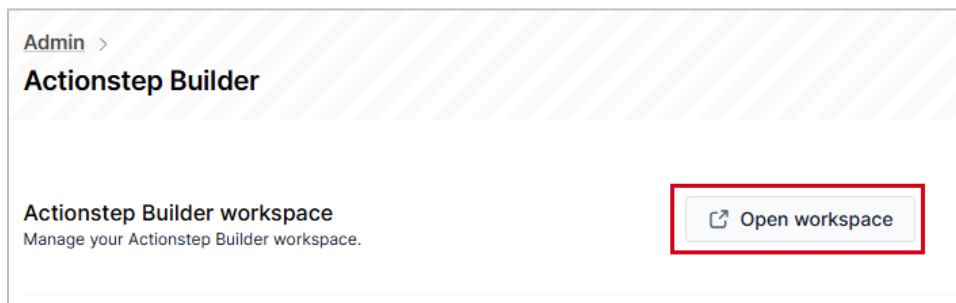
Lesson 15: Launch the Builder Online Workspace

So far, all your work to build your template has been done using Microsoft Word and the Word Designer. However, much of the work you've been doing creating variables and working with object models is being managed in Builder. You can access Builder by using the Online Workspace. In fact, some of the last tasks you need to do to finish automating the template must be done in the Online Workspace.

Let's open the Online Workspace now.

To do this:

1. Sign in to Actionstep.
2. Go to **Admin > Builder**. The Actionstep Builder page appears.
3. Click **Open Workspace**.



Your instance of Builder is opened in a new browser tab.

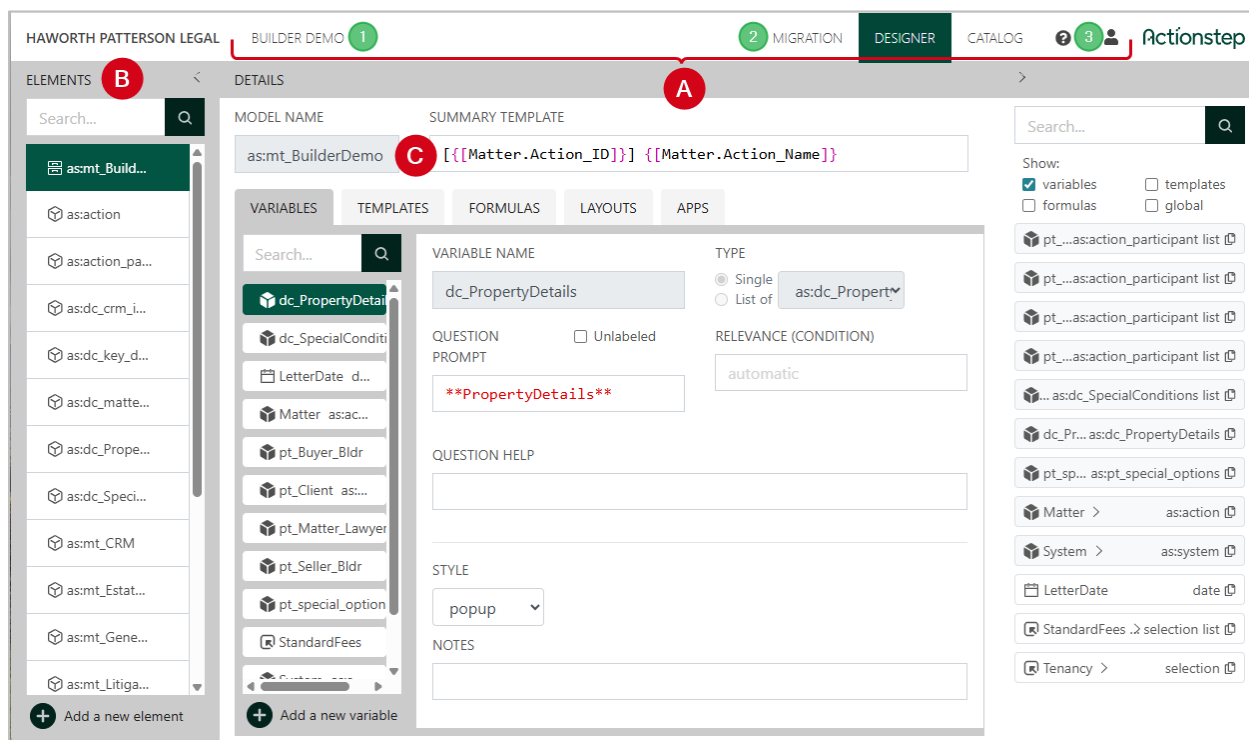
4. If prompted, sign in using your Builder credentials.

TIP: You might consider bookmarking your Online Workspace URL so you can more easily get to it without launching it from Word.

Lesson 16: Explore the Online Workspace

NOTE: This lesson doesn't explore the Builder interface in depth, but it does point out some key features. For a complete description of what's available, see the help article, [Getting to Know Builder's Online Workspace](#).

The Builder Online Workspace has a few different sections:



A. The main toolbar lets you:

1. Access your catalogs/matter types and generate documents for them.
2. Toggle between managing your catalogs (or matter types) and your templates/models/variables.
3. Access help and other system management tools.

B. The contents of the left sidebar changes based on which area of the workspace you're viewing, but it typically shows the top-level components of that area. For example, if you're viewing the **Catalog** tab, it lists all the catalogs in your system. (Remember, catalogs are like matter types.) If you're viewing the **Designer** tab, it gives you access to your individual catalogs and object models. If you're viewing a specific catalog, it shows the different records (i.e., documents or document sets) you've generated.

C. The main part of the page shows specific details about whatever item you've selected. For example, if you select the **as:mt_BuilderDemo** catalog, you can access and work with all the components associated with this catalog. Most of the rest of our training will focus on the options available in this area.

Lesson 17: Create a Formula for Calculating Fees and Costs

Background Information

Formulas are composed of expressions, which provide the syntax used to combine or transform pieces of information in your document. They can be used to perform simple or complex mathematical equations, or they can be used to manipulate text or other Builder expressions in your document.

While this lesson covers a less complicated formula, experienced users can create highly complex calculations and formulas to help them with their trickier situations. To see a list of potential use cases, see the article, [Formula Reference](#) (which is hosted on the Knackly help site).

Complete the Lesson

In Lesson 11, you automated the *Fees and Costs* clause of the template. Specifically, you created a selection variable that lists all the types of fees (plus the fee amount) that might apply to the purchase of the property. In this lesson, you will create a formula that sums the fees the user selected. However, since the selection variable is text-based, part of that formula must convert the text values to number values.

There are two parts to this lesson:

1. Creating the formula
2. Inserting the formula in the Word template

Part 1: Create the Formula

As stated previously, this lesson shows you how to create a formula that converts text to a number and then sums it. Following is the recommended expression for this formula. The parts of the expression you'll replace with variable information are marked with **red**:

```
[name of selection list variable]|reduce: _result + [Column Name To Add].toInt(): 0
```

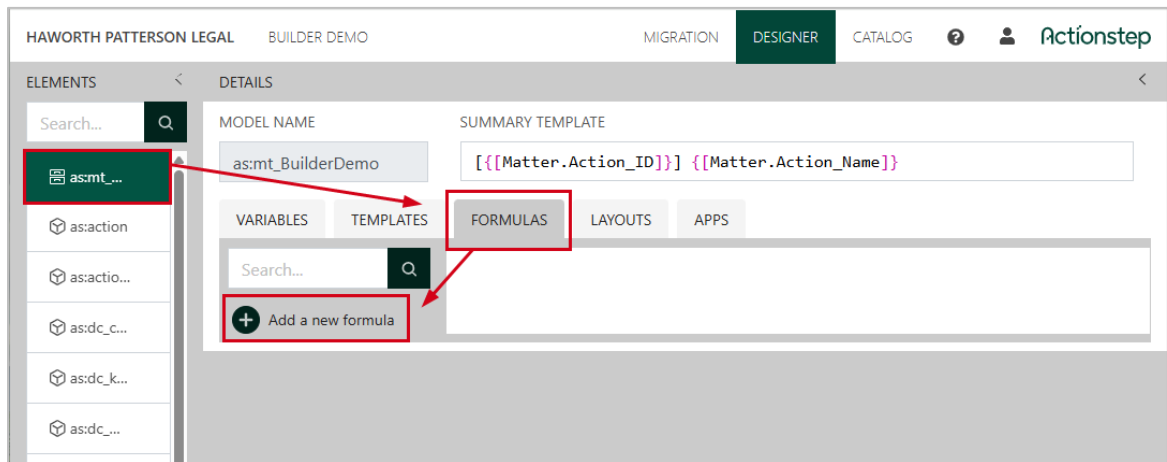
Once you've replaced the placeholders (which are highlighted in this example) with the correct values, your formula will look like this:

```
StandardFees|reduce: _result + Amount.toInt(): 0
```

This expression takes the text in the **Amount** column of the **StandardFees** selection variable, converts it to a number, and then sums each row the user selects during the interview. It then displays the total amount as a number.

To create a formula:

1. If you've closed the Online Workspace, reopen it. (See "Lesson 15: Launch the Builder Online Workspace" on page 64 if you need help.)
2. In the Online Workspace, click the **Designer** tab (if it's not selected already). In the **Elements** list on the left side of the window, make sure **as:mt_BuilderDemo** is selected.
3. Click the **Formulas** tab and click **Add a new formula**.



The New Formula window appears.

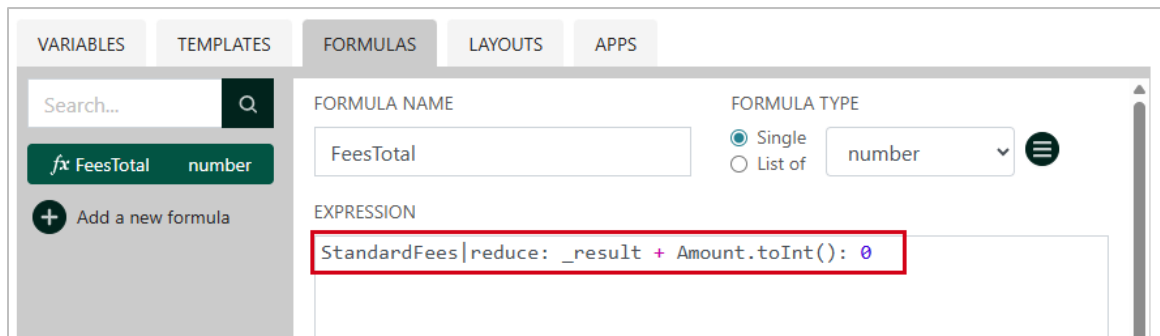
4. Leave **Type** set to **Single** and choose **Number** from the drop-down list.
5. In the **Formula Name** field, enter **FeesTotal**.

The 'New Formula' dialog box is shown. It has a title bar 'New Formula'. Under 'TYPE', there are two radio buttons: 'Single' (which is selected) and 'List of'. To the right of the radio buttons is a drop-down menu showing 'number'. Below this is the 'FORMULA NAME' section with a text input field containing 'FeesTotal'. At the bottom, there are two buttons: 'Ok' and 'Cancel'.

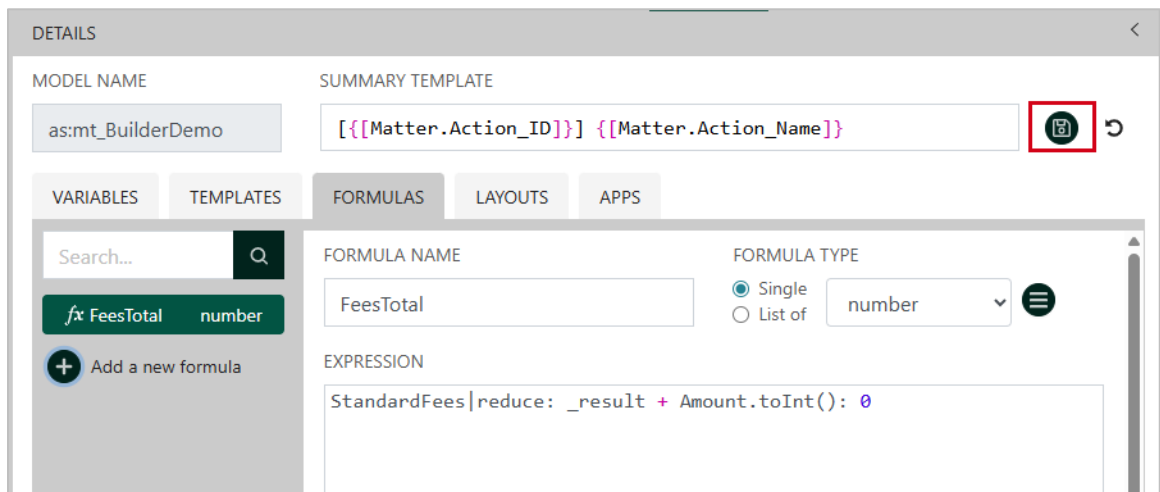
6. Click **OK**. The formula variable is created and displayed so you can enter the formula's expression.
7. In the **Expression** box, enter the following expression (which we explained earlier in this section):

```
StandardFees|reduce: _result + Amount.toInt(): 0
```

Your formula should look like this:



8. Click the **Save** icon to save your work.

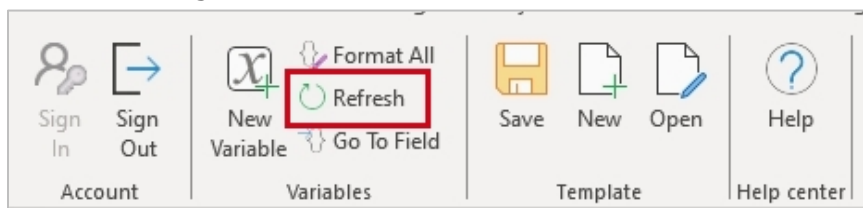


Part 2: Insert the Formula in the Template

Now that you have created the formula, you can insert it into your template.

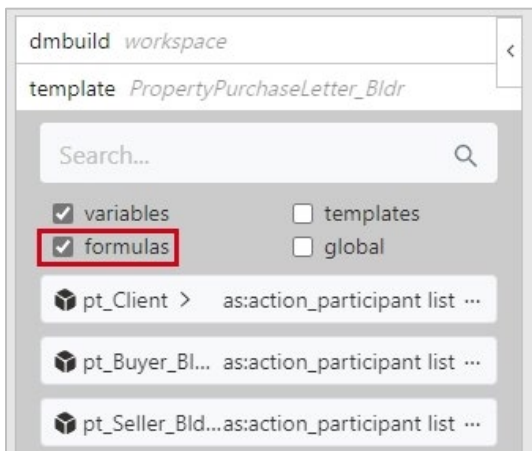
To do this:

1. Open your template to edit it if it's closed. (See "Opening, Saving, and Closing the Tutorial Template" on page 5 for help.)
2. In the **Builder** ribbon, click **Refresh** to refresh the list of variables and formulas in the Word Designer.

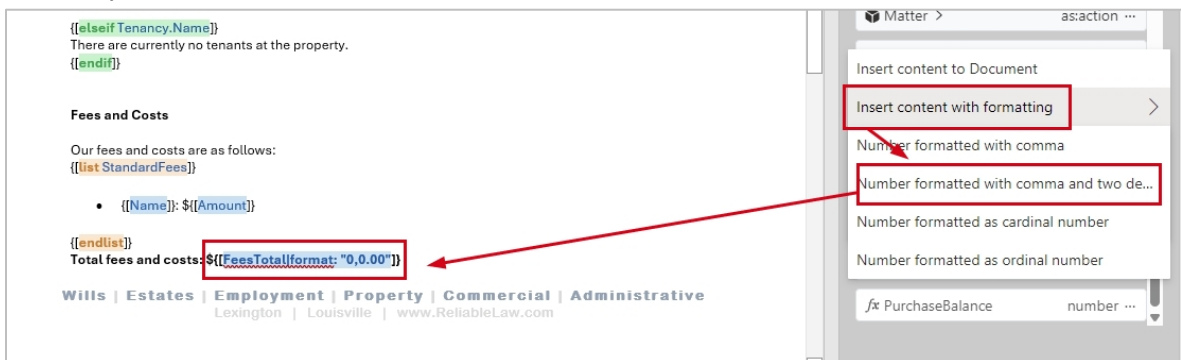


3. Scroll to the **Fees and Costs** clause in the template.

4. Highlight and delete 3325 after the text *Total fees and costs*. Don't delete the dollar sign.
5. In the Word Designer, select **Formulas** above the list of components.



6. Find the **FeesTotal** formula.
7. Click its ellipses icon and choose **Insert content with formatting**, followed by **Number formatted with comma and two decimals**. The variable is inserted into the template.



8. Click **Save** on the **Builder** ribbon to save your work.

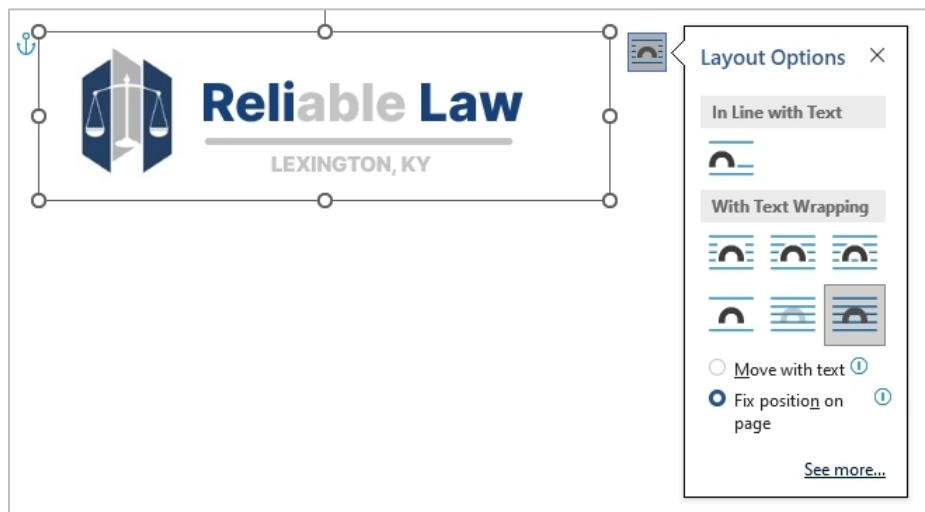
NOTE: You can learn more about this formula (and others) from these two Knackly Help resources: [Formula Reference](#) and [Knackly Formula for Totaling Costs in Tables](#).

Lesson 18: Insert Custom Letterhead

When sending letters or generating client documents, you often want to include graphics or branding that's specific to your firm—especially if there are multiple firm locations in your organization. The Property Purchase Letter could have two potential letterheads—one for the Lexington office and one for the Louisville office.

The easiest way to insert optional branding or imagery is to place the imagery in separate Word documents and insert the correct document in the template based on an *if* instruction/condition.

This tutorial includes two Word documents: *LetterheadLexington.docx* and *LetterheadLouisville.docx*. These documents contain images that have a fixed position on the page, which ensures the letterhead will always appear at the top of the completed letter. This is how the letterhead is set up:



There are three parts to this lesson:

1. Creating the selection variable for users to choose which letterhead they want
2. Adding the letterhead templates that will be inserted to Builder
3. Creating the instructions to insert the letterhead in the template

Part 1: Create the Selection Variable for the Letterhead

In this part of the lesson, you will create a selection variable that provides the options users can choose from when adding the letterhead.

To do this:

1. If you've closed the Online Workspace, reopen it. (See "Lesson 15: Launch the Builder Online Workspace" on page 64 if you need help.)
2. In the Builder Online Workspace, click the **Designer** tab and make sure **as:mt_BuilderDemo** is selected in the **Elements** list.
3. In the main section of the page, click the **Variables** tab.
4. At the bottom of the **Variables** list, click **Add a new variable**.

DETAILS

MODEL NAME: as:mt_BuilderDemo

SUMMARY TEMPLATE: [{{Matter.Action_ID}}] [{{Matter.Action_Name}}]

VARIABLES | TEMPLATES | FORMULAS | LAYOUTS | APPS

Search...

dc_PropertyDetails

dc_SpecialConditions

LetterDate date

Matter as:action

pt_Buyer_Bldr as:...

pt_Client as:actio...

pt_Matter_Lawyer_Bldr

pt_Seller_Bldr as:...

pt_special_Options

Standard Fees sel...

+ Add a new variable

VARIABLE NAME: dc_PropertyDetails

TYPE: ☒ Single ☐ List of as:dc_PropertyDe

QUESTION PROMPT: ☐ Unlabeled **PropertyDetails**

RELEVANCE (CONDITION): automatic

QUESTION HELP:

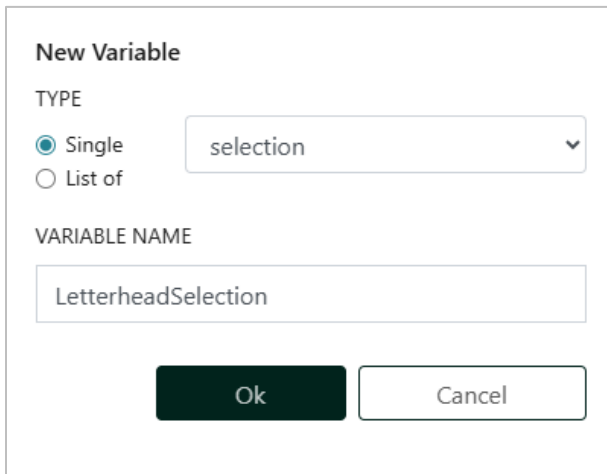
STYLE: popup

NOTES:

The New Variable window appears.

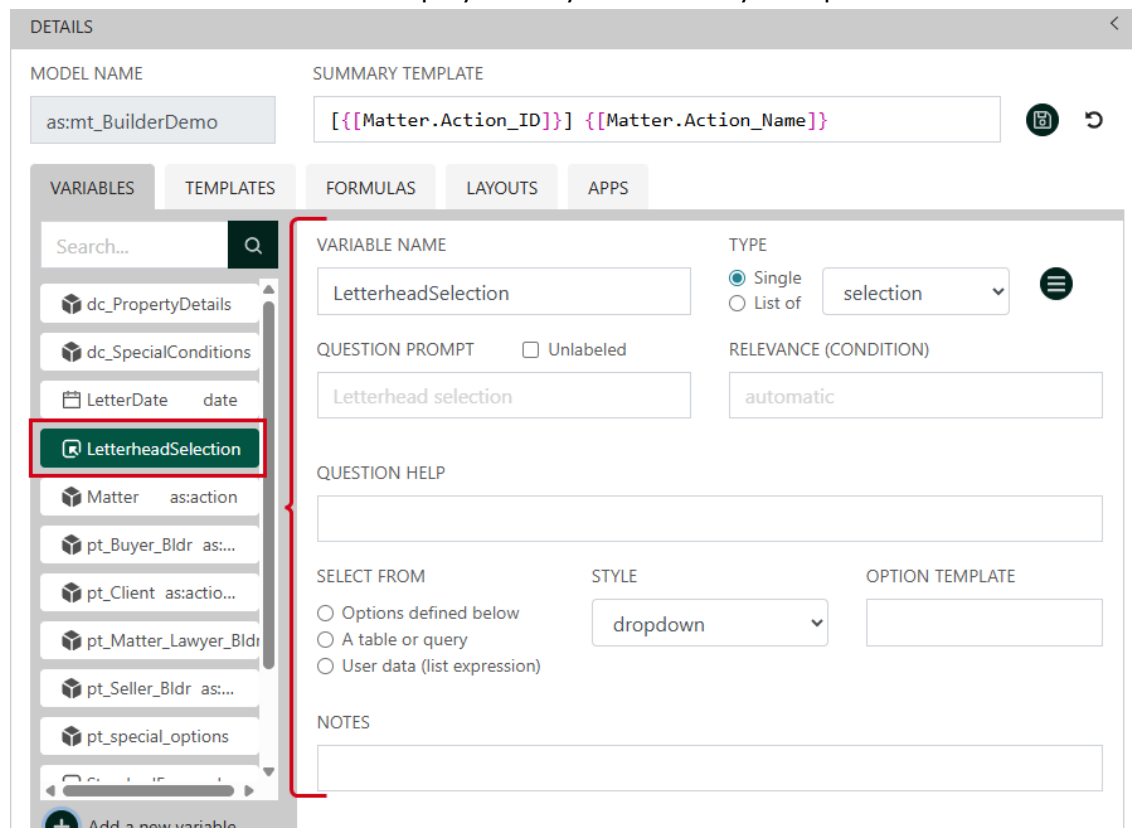
5. Leave **Type** set to **Single** and choose **Selection** from the drop-down list.

6. In the **Variable Name** field, enter **LetterheadSelection** and click **OK**.



The 'New Variable' dialog box is shown. It has a 'TYPE' section with 'Single' selected and a dropdown menu showing 'selection'. Below is a 'VARIABLE NAME' field containing 'LetterheadSelection'. At the bottom are 'Ok' and 'Cancel' buttons.

The variable is created and displayed for you to enter your options.



The variable editor interface is shown. On the left is a list of variables with 'LetterheadSelection' highlighted in a red box. The main area on the right is for editing the selected variable. It includes fields for 'VARIABLE NAME' (LetterheadSelection), 'TYPE' (Single, selection), 'QUESTION PROMPT' (Letterhead selection), 'RELEVANCE (CONDITION)' (automatic), 'QUESTION HELP', 'SELECT FROM' (Options defined below), 'STYLE' (dropdown), 'OPTION TEMPLATE', and 'NOTES'. A red bracket on the left side of the editor groups the 'QUESTION PROMPT', 'QUESTION HELP', 'SELECT FROM', 'STYLE', 'OPTION TEMPLATE', and 'NOTES' sections.

This editor should look similar to the editor you used when creating selection variables in the Word template.

7. In the **Question Prompt** field, enter the text **Choose your letterhead**.
8. In the **Select From** group, select **Options defined below**.
9. Click the **Style** drop-down list and choose **Radiobuttons**.
10. In the first row of the **Name** column, enter **Lexington Office Logo**.

11. Press **Enter** to create a second row. (You can also click **Add row**.)

TIP: If you add an extra row that you don't need, click on the row number and choose **Delete** to remove it.

12. In the second row, enter **Louisville Office Logo**.

Your variable should look like this:

The screenshot shows a configuration interface for a variable named 'LetterheadSelection'. The 'TYPE' is set to 'Single' with a 'selection' dropdown. The 'QUESTION PROMPT' is 'Choose your letterhead' and is 'Unlabeled'. The 'RELEVANCE (CONDITION)' is 'automatic'. The 'QUESTION HELP' field is empty. Under 'SELECT FROM', 'Options defined below' is selected. The 'STYLE' is 'radiobuttons'. The 'OPTION TEMPLATE' field is empty. At the bottom, a table lists two options: '1 Lexington Office Logo' and '2 Louisville Office Logo'. An 'Add row' button is at the bottom left of the table.

VARIABLE NAME		TYPE							
LetterheadSelection		<input checked="" type="radio"/> Single	selection						
		<input type="radio"/> List of							
QUESTION PROMPT		RELEVANCE (CONDITION)							
Choose your letterhead		automatic							
<input type="checkbox"/> Unlabeled									
QUESTION HELP									
SELECT FROM		STYLE	OPTION TEMPLATE						
<input checked="" type="radio"/> Options defined below		radiobuttons							
<input type="radio"/> A table or query									
<input type="radio"/> User data (list expression)									
<table border="1"><thead><tr><th></th><th>A Name</th></tr></thead><tbody><tr><td>1</td><td>Lexington Office Logo</td></tr><tr><td>2</td><td>Louisville Office Logo</td></tr></tbody></table>					A Name	1	Lexington Office Logo	2	Louisville Office Logo
	A Name								
1	Lexington Office Logo								
2	Louisville Office Logo								
<div>+ Add row</div>									

13. Click the **Save** icon to save your work. (It's located next to the Summary Template field, near the top of the page.)

Part 2: Add the Letterhead Templates to Builder

As part of this tutorial, you've received two Word documents that contain the different letterhead options you can insert in your demo template. These are basic Word files that contain a graphic showing the firm name, location, and logo. There is nothing additional you need to do to set these templates up, except add them to Builder so they can be available

for inclusion in your Property Purchase Letter. In this part of the lesson, we'll show you how to upload them to Builder.

To do this:

1. In the main section of the Builder Online Workspace, click the **Templates** tab. You'll see a reference to the Word template you've been automating already listed here.

DETAILS

MODEL NAME: as:mt_BuilderDemo

SUMMARY TEMPLATE: [{{Matter.Action_ID}}] [{{Matter.Action_Name}}]

VARIABLES | **TEMPLATES** | FORMULAS | LAYOUTS | APPS

Search... [Q]

PropertyPurchaseLetter...

+ Add a new template

TEMPLATE NAME: PropertyPurchaseLetter_Bldr

TEMPLATE TYPE: docx

ASSEMBLED FILE NAME:

TEMPLATE FILE: PropertyPurchaseLetter_Bldr.docx

Updated: 04/29/2026 11:54 AM by Christina Stommel 48701 bytes

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NOTES:

2. Click **Add a new template**. The New Template window appears.
3. Enter **LetterheadLexington** in the **Template Name** field.
4. Click the **Type** drop-down list and choose **docx**, and then click **OK**.

New Template

TEMPLATE NAME: LetterheadLexington

Type: docx

Ok Cancel

5. In the form that appears, click **Upload**.

DETAILS

MODEL NAME: as:mt_BuilderDemo

SUMMARY TEMPLATE: [[Matter.Action_ID]] [[Matter.Action_Name]]

VARIABLES | **TEMPLATES** | FORMULAS | LAYOUTS | APPS

Search...

LetterheadLexington

PropertyPurchaseLette...

+ Add a new template

TEMPLATE NAME: LetterheadLexington

TEMPLATE TYPE: docx

ASSEMBLED FILE NAME:

TEMPLATE FILE:

Updated: 04/29/2026 12:10 PM

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NOTES:

6. Browse to and select the **LetterheadLexington.docx** file you received as part of this tutorial. (Click **Open** once you've selected the file.) The template is now associated with this catalog/matter type in Builder.

VARIABLES | **TEMPLATES** | FORMULAS | LAYOUTS | APPS

Search...

LetterheadLexington

PropertyPurchaseLette...

+ Add a new template

TEMPLATE NAME: LetterheadLexington

TEMPLATE TYPE: docx

ASSEMBLED FILE NAME:

TEMPLATE FILE: LetterheadLexington.docx

Updated: 04/29/2026 12:13 PM by Jenessa McBride 38388 bytes

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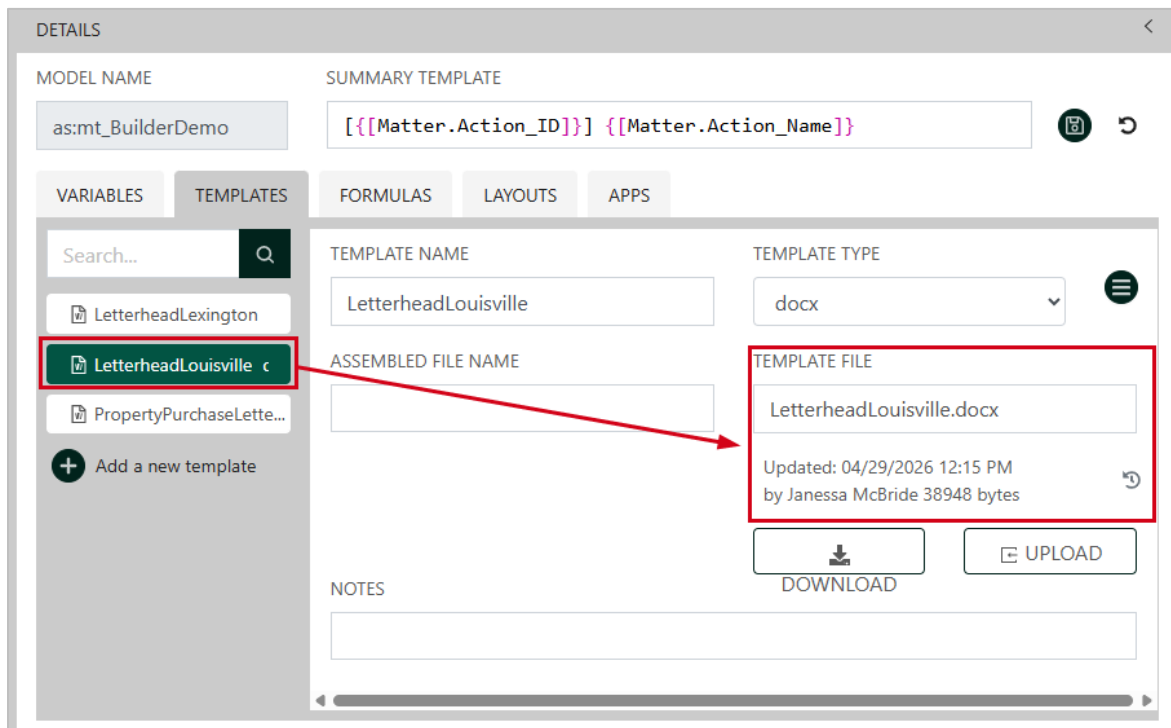
NOTES:

7. Click the **Save** icon to save your work.

On Your Own

- Add **LetterheadLouisville.docx** to the **Templates** list. Name the template **LetterheadLouisville**. To help, review the steps you just followed to add the

Lexington letterhead.



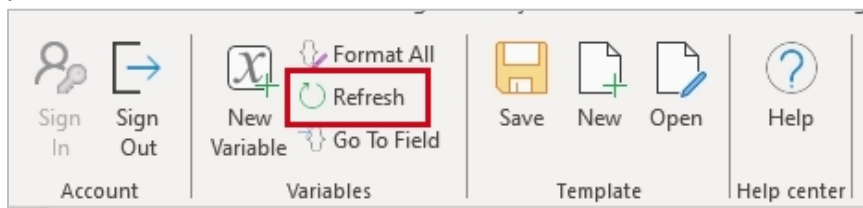
- Remember to **Save** your work when you're finished.

Part 3: Insert the Letterhead in the Template

Now that you've created the variable that will determine which letterhead will be inserted as well as uploaded the letterhead documents to Builder, you can add the instructions to the template.

To do this:

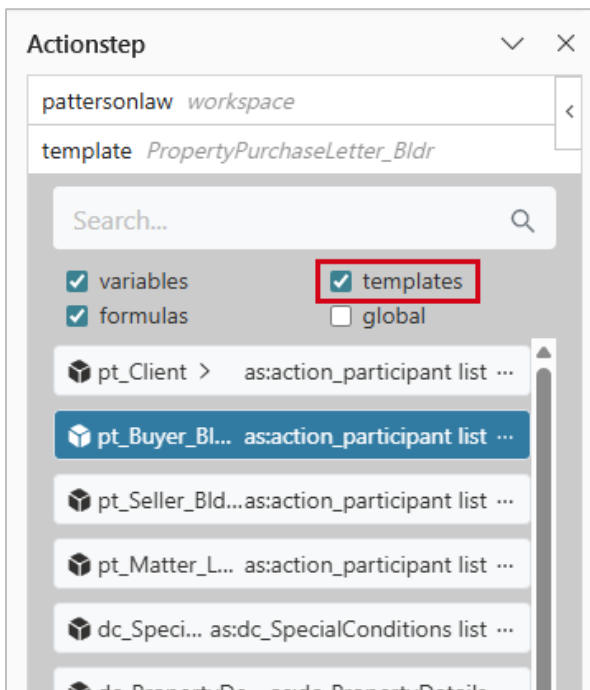
- Open your template to edit it if it's closed. (See "Opening, Saving, and Closing the Tutorial Template" on page 5 for help.)
- In the **Builder** ribbon, click **Refresh** to sync the Word Designer with the changes you've made in Builder.



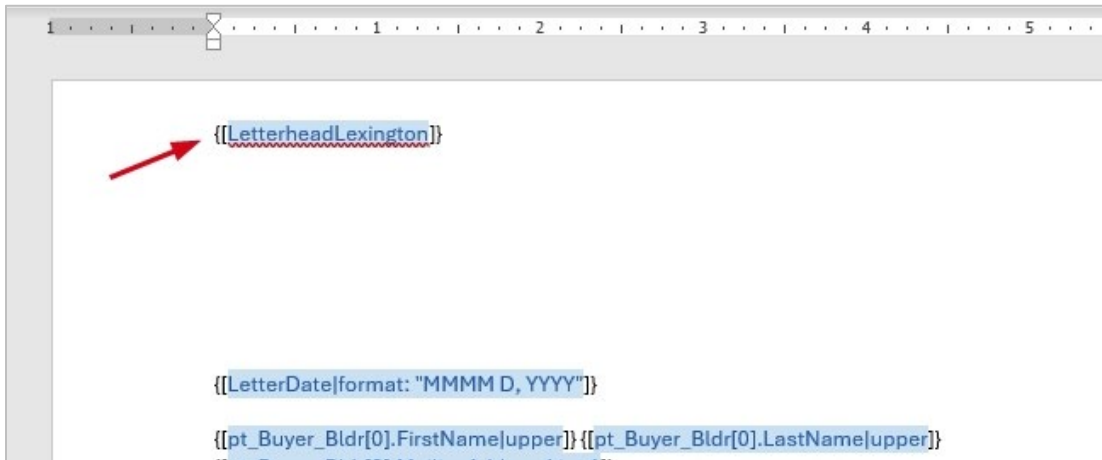
- At the top of the template, select the **Reliable Law** image and delete it.



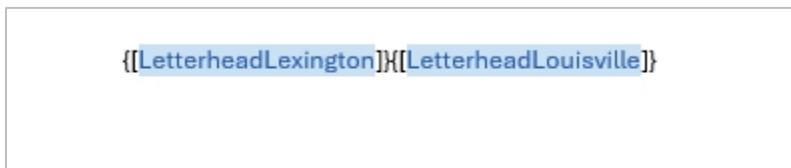
- Place your cursor on the top line of the document.
- In the Word Designer, select **Templates** at the top of the variable list.



- Find **LetterheadLexington** and double-click it. The field is inserted in the template. (Double-clicking is another way you can insert a variable in a template.)

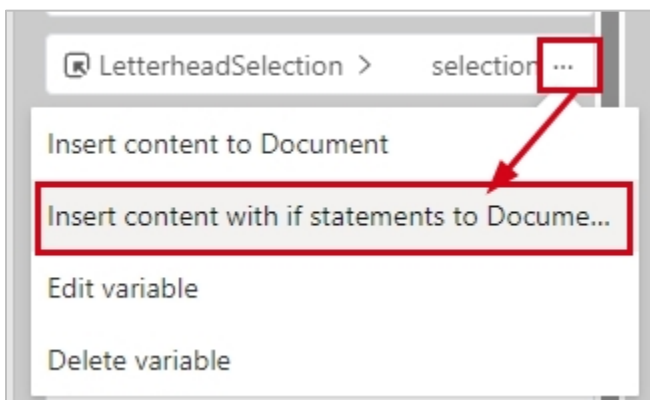


- Make sure your cursor is immediately after the **LetterheadLexington** field and insert the **LetterheadLouisville** variable by double-clicking it in the variable list. When you're finished, it should look like this:



Now you will create a condition that determines which letterhead is inserted by using the selection variable you created earlier.

- In the template text, highlight the **LetterheadLexington** field (including the `{{}}` field markers).
- Find the **LetterheadSelection** variable and click the ellipses icon next to its name.
- Choose **Insert content with if statements to Document**.



A second window appears.

- Select **Is** for the first drop-down list and **Lexington Office Logo** for the second drop-down list.

12. Select **Include Else**.



if Letter... Is equal to Lexington Office Logo

☒ Include Else

INSERT

13. Click **Insert**. The instruction is inserted in the template.

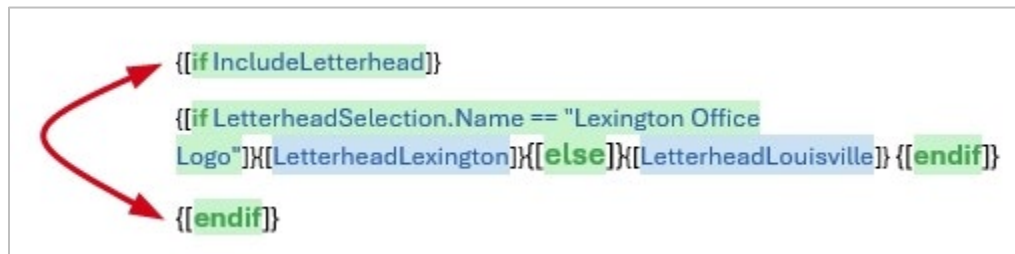
14. Using Word's Cut and Paste commands, clean up the instruction:

- Move the **LetterheadLouisville** field so it's between the **else** and **endif** fields.
- Remove all the hard returns so that the instructions and variables are all in the same paragraph, like this:

```
{{if LetterheadSelection.Name == "Lexington Office  
Logo"}}{{LetterheadLexington}}{{else}}{{LetterheadLouisville}}{{endif}}
```

15. Click **Save** on the **Builder** ribbon to save your work.

NOTE: If you wanted to make the overall letterhead optional, you could 1) create a true/false selection variable, and 2) insert that variable as a condition around the current letterhead instruction. It might look something like this:



```
{{if IncludeLetterhead}}  
{{if LetterheadSelection.Name == "Lexington Office  
Logo"}}{{LetterheadLexington}}{{else}}{{LetterheadLouisville}}{{endif}}  
{{endif}}
```

Lesson 19: Adjust How the Questions Appear in the Form

When your users generate a letter from this template, all of the questions will be presented in an “interview.” You’ll want to make sure the order questions are asked make sense and follow the natural flow for the letter.

Using the Layout tab in the Online Workspace, you can control the order in which questions are asked in your interview as well as arrange how variables are laid out in the interview.

There are three parts to this lesson:

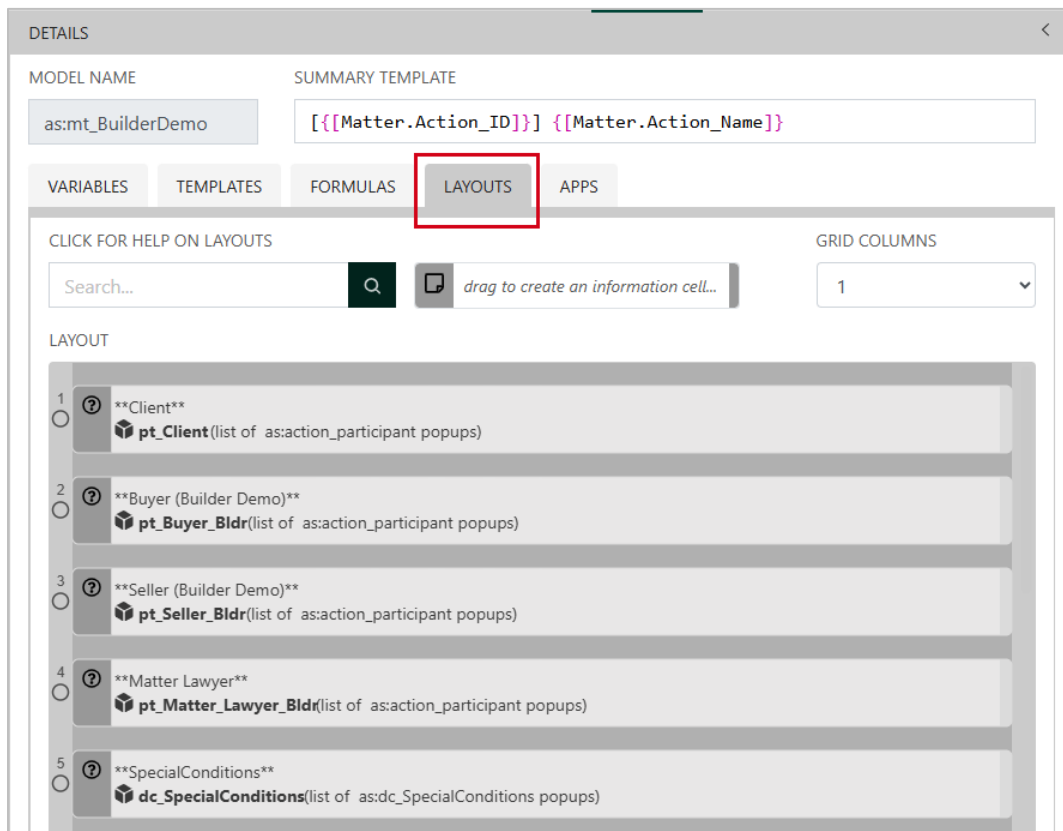
1. Viewing the Layouts tab
2. Understanding how to work with the components of this tab
3. Rearranging the variables for the interview

Part 1: Viewing the Layouts Tab

To do this:

1. If you’ve closed the Online Workspace, reopen it. (See “Lesson 15: Launch the Builder Online Workspace” on page 64 if you need help.)
2. Click the **Designer** tab and make sure **as:mt_BuilderDemo** is selected in the **Elements** list.

3. In the main section of the page, click the **Layouts** tab.



A list of all the variables and other components you've used in your template are listed. You can see that they aren't in any logical order.

Part 2: Understanding How to Work with the Components of the Layout Tab

The **Layouts** tab includes several options to help you design the interview:

- You can use an **Information Cell** to provide additional context for the questions in the interview.



- By choosing **Grid Columns**, you can indicate how many variables can be placed on the same line.

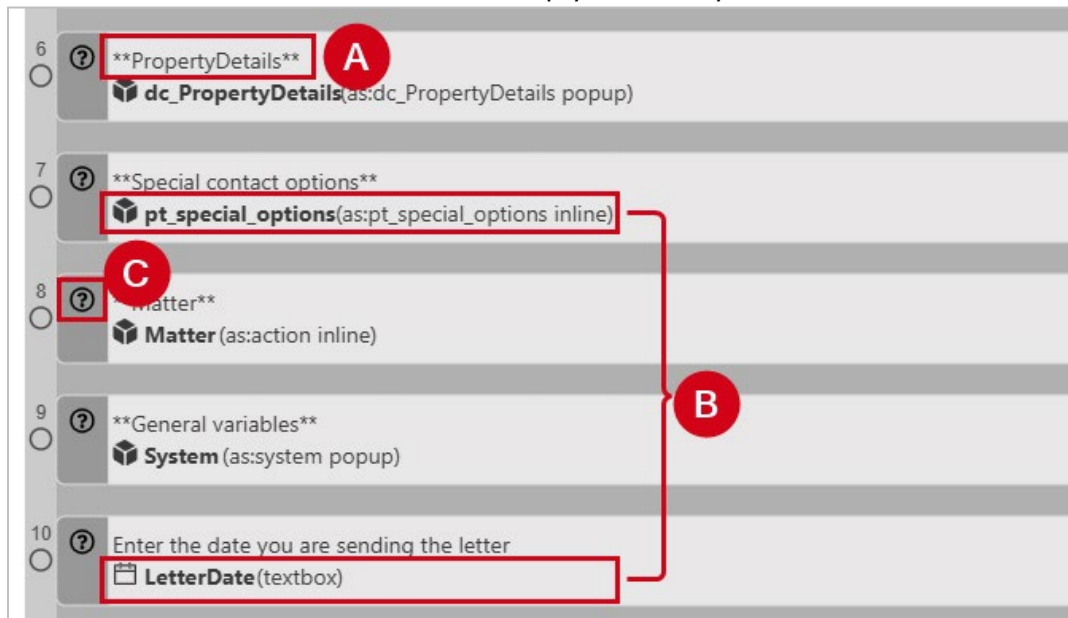


For example, this is useful for name and address fields since it more closely “relates”

the fields with each other. (It's much easier to view *First Name* and *Last Name* fields side by side rather than on separate lines.)

- In the **Layout** section, each variable in the catalog* is listed. By default, each variable is listed on its own line. (*Remember, you can add multiple templates to a catalog, so you may see more variables than you might expect. This Layout covers all variables used in all templates in the catalog.)

Variable fields include information to help you identify them:



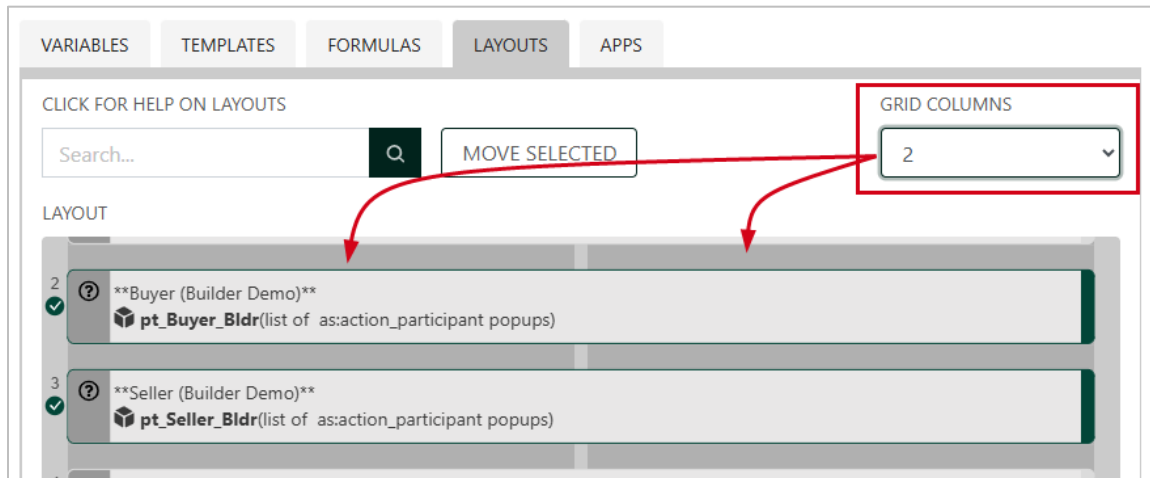
- A. The first line of text on the variable field shows the question or prompt text that will be used in the interview.
 - B. The second line of text shows the name of the variable and any other identifying icons or details about the variable (for example, if it's a selection variable, how the options will be displayed (e.g., radio buttons or checkboxes)).
 - C. Click the question icon to view isolated details about the variable. The **Move to** option lets you move variables within the list.
- You can click on a field and drag it to a new location in the list. If you've elected to use columns, dragging the field to one of these column locations will position it next to the field to the left of it. If you want to drag a field and it be its own line, drag it to the left -most column.
 - You can also select the checkbox for a field or group of fields and use the **Move Selected** option to more easily move a larger selection of fields to a new location.

Part 3: Rearranging Variables on the Layouts Tab

Now that you understand a bit more about how options on this tab work, let's arrange the variables used in the interview.

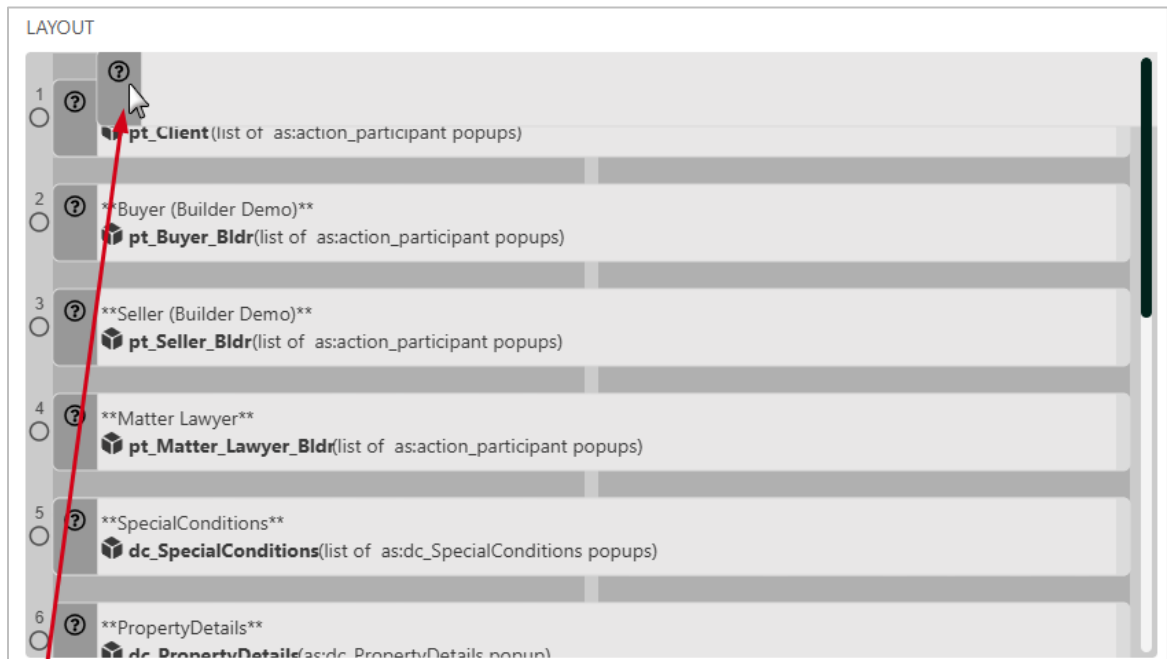
To do this:

1. Click the **Grid Columns** drop-down list and choose **2**. This means that up to two variables can be placed next to each other on each line.



Since high-level information about the matter will help guide users through the rest of the questions in the interview, let's make sure the matter-related variables are asked first.

2. Scroll down in the list of variables until you see **Matter**. (It's on Row 8.)
3. Click on this variable field and drag it to the top of the list of variables. You'll see an empty field/box that indicates you can drop the item there.



NOTE: Even though you might not be able to see row 1 in this list, if you keep dragging near the top of the list, row 1 will eventually scroll into view. If this is a struggle, you can instead select the checkbox for the **Matter** variable, click **Move Selected**, and then indicate you want to move the cell **Above row 1**.

4. Leave the **Client** variable on row 2 since matter and client information is usually so closely related. (Variables from the Client object model aren't used in the Purchase Letter template, so they won't actually be asked in the interview.)
5. Move the **LetterDate** variable on row 10 to row 3—just below the Client field. This is how it should look when you're finished:

6. Following these instructions, rearrange the remaining variables so they are in this order. Some may already be in the correct position:

Row 4	pt_Buyer_Bldr
Row 5	pt_Seller_Bldr
Row 6	dc_PropertyDetails
Row 7	StandardFees
Row 8	dc_Special Conditions
Row 9	Tenancy

Row 10	Pt_Matter_Lawyer_Bldr
Row 11	LetterheadSelection
Row 12	<p>pt_special_options</p> <p>Note: This is a core object model that is synced to Builder by default. None of the variables in it are used in the template, so it can be listed near the bottom of this list.</p>
Row 13	<p>System</p> <p>Note: This is another core object model this always synced to Builder. This can appear near the bottom of the list as well.</p>


This is what your Layout should look like:

LAYOUT	
1	<div> <div>?</div> <div> **Matter** Matter(as:action inline) </div> </div>
2	<div> <div>?</div> <div> **Client** pt_Client(list of as:action_participant popups) </div> </div>
3	<div> <div>?</div> <div> Enter the date you are sending the letter <div> <input type="text"/> LetterDate(textbox) </div> </div> </div>
4	<div> <div>?</div> <div> **Buyer (Builder Demo)** pt_Buyer_Bldr(list of as:action_participant popups) </div> </div>
5	<div> <div>?</div> <div> **Seller (Builder Demo)** pt_Seller_Bldr(list of as:action_participant popups) </div> </div>
6	<div> <div>?</div> <div> **PropertyDetails** dc_PropertyDetails(as:dc_PropertyDetails popup) </div> </div>
7	<div> <div>?</div> <div> Select the fees that apply to this purchase <div> <input type="checkbox"/> StandardFees(checkboxes) </div> </div> </div>
8	<div> <div>?</div> <div> **SpecialConditions** dc_SpecialConditions(list of as:dc_SpecialConditions popups) </div> </div>
9	<div> <div>?</div> <div> Is a tenancy noted on the contract? <div> <input type="radio"/> Tenancy(radiobuttons) </div> </div> </div>
10	<div> <div>?</div> <div> **Matter Lawyer** pt_Matter_Lawyer_Bldr(list of as:action_participant popups) </div> </div>
11	<div> <div>?</div> <div> Choose your letterhead <div> <input type="radio"/> LetterheadSelection(radiobuttons) </div> </div> </div>
12	<div> <div>?</div> <div> **Special contact options** pt_special_options(as:pt_special_options inline) </div> </div>
13	<div> <div>?</div> <div> **General variables** System(as:system popup) </div> </div>

7. Click the **Save** icon to save your work.

Next, you'll add some section headings to the interview that can help better organize the content.

8. Click on the **Drag to create an information cell** field.



CLICK FOR HELP ON LAYOUTS


Search...

drag to create an information cell...

GRID COLUMNS

2

9. Drag the field so that it appears between rows 3 and 4 (**LetterDate** and **pt_Buyer_Bldr**).



LAYOUT

1 ? **Matter**
Matter (as:action inline)

2 ? **Client**
pt_Client (list of as:action_participant popups)

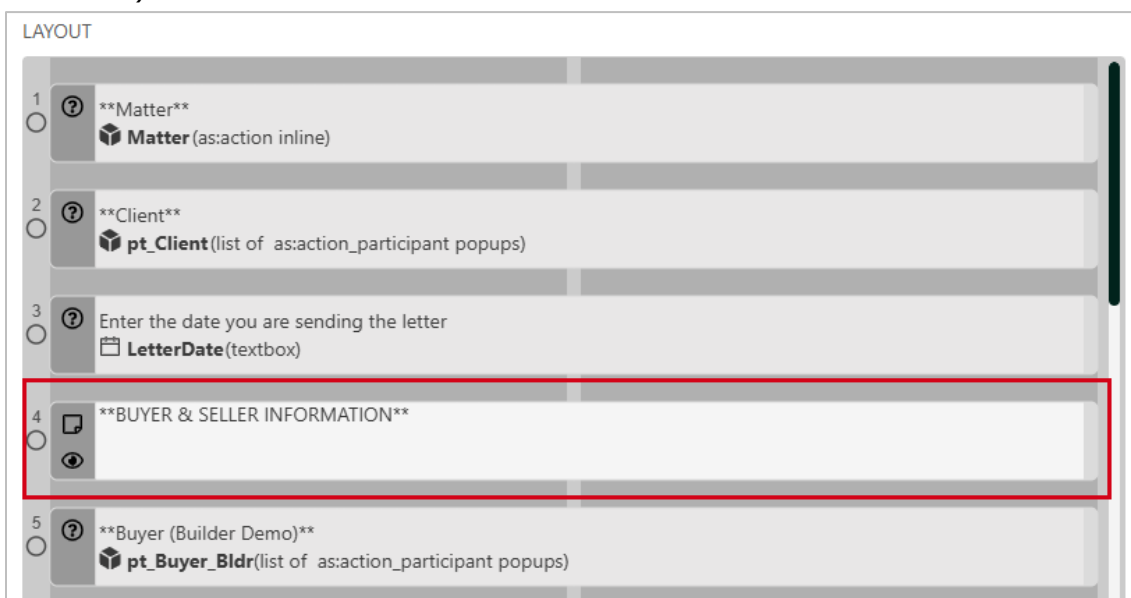
3 ? Enter the date you are sending the letter
LetterDate (textbox)

4 ? [drag to create an information cell...]

5 ? **Buyer (Builder Demo)**
pt_Buyer_Bldr (list of as:action_participant popups)

6 ? **Seller (Builder Demo)**
pt_Seller_Bldr (list of as:action_participant popups)

10. Click in the field and type ****BUYER & SELLER INFORMATION**** then click **Save**.
(The asterisks indicate that the text should be bolded when it's displayed in the interview.)



LAYOUT

1 ? **Matter**
Matter (as:action inline)

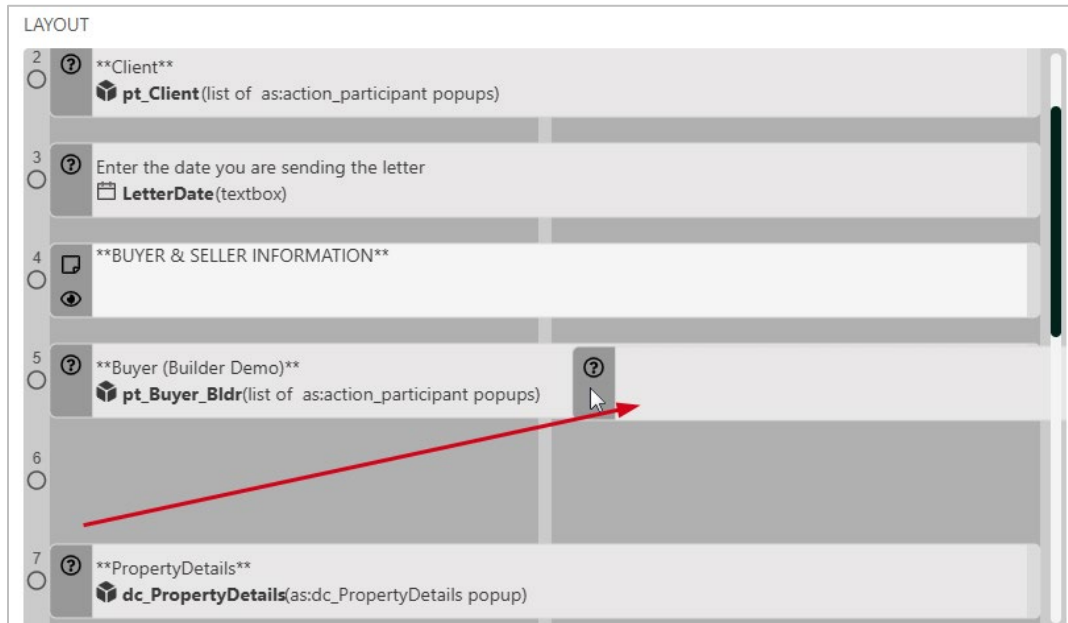
2 ? **Client**
pt_Client (list of as:action_participant popups)

3 ? Enter the date you are sending the letter
LetterDate (textbox)

4 ? **BUYER & SELLER INFORMATION**

5 ? **Buyer (Builder Demo)**
pt_Buyer_Bldr (list of as:action_participant popups)

11. Click on the **pt_Seller_Bldr** field and drag it so that it appears next to **pt_Buyer_Bldr**.



When you're finished, it should look like this:



NOTE: Depending on your window size, these two fields may actually be shown stacked on top of each other. As long as they are both listed as row 5, this is correct.

12. Click the **Save** icon to save your changes.

On Your Own

Following the instructions in the previous section:

- Add an information cell between rows 5 and 6 (the **pt_Buyer_Bldr/pt_Seller_Bldr** and **dc_PropertyDetails** fields) called **PROPERTY & PURCHASE DETAILS**. Make sure you add asterisks to make the heading bold.
- Once you've added the above cell, add one more between rows 10 and 11 (the **Tenancy** and **pt_Matter_Lawyer_Bldr** fields) called **MISCELLANEOUS INFORMATION**. Make sure this heading is bolded as well.
- Click the **Save** icon to save your changes when you are finished.

With the addition of these two information cells, your list should look like this:

The screenshot shows the 'LAYOUTS' tab in the Builder interface. At the top, there are tabs for 'VARIABLES', 'TEMPLATES', 'FORMULAS', 'LAYOUTS', and 'APPS'. Below these is a search bar and a 'GRID COLUMNS' dropdown set to '2'. The main area is titled 'LAYOUT' and contains a list of information cells. The first cell, labeled '6', is titled '**PROPERTY & PURCHASE DETAILS**' and is highlighted with a red box. The second cell, labeled '7', is titled '**PropertyDetails**' and contains a sub-section 'dc_PropertyDetails(as:dc_PropertyDetails popup)'. The third cell, labeled '8', is titled 'Select the fees that apply to this purchase' and contains a sub-section 'StandardFees(checkboxes)'. The fourth cell, labeled '9', is titled '**SpecialConditions**' and contains a sub-section 'dc_SpecialConditions(list of as:dc_SpecialConditions popups)'. The fifth cell, labeled '10', is titled 'Is a tenancy noted on the contract?' and contains a sub-section 'Tenancy(radiobuttons)'. The sixth cell, labeled '11', is titled '**MISCELLANEOUS INFORMATION**' and is highlighted with a red box.

You will be able to see how this interview is organized when we test the interview in "Lesson 21: Test Your Template in Builder."

Lesson 20: Setting Up an App for Document Generation

Background Information

In Builder, an *app* is what's used to group related templates for document generation. For example, if you are creating a collection of Estate Planning documents, you can use a single app to ensure all the related documents are generated. Similarly, if the template will be used in isolation, you can assign it to its own app.

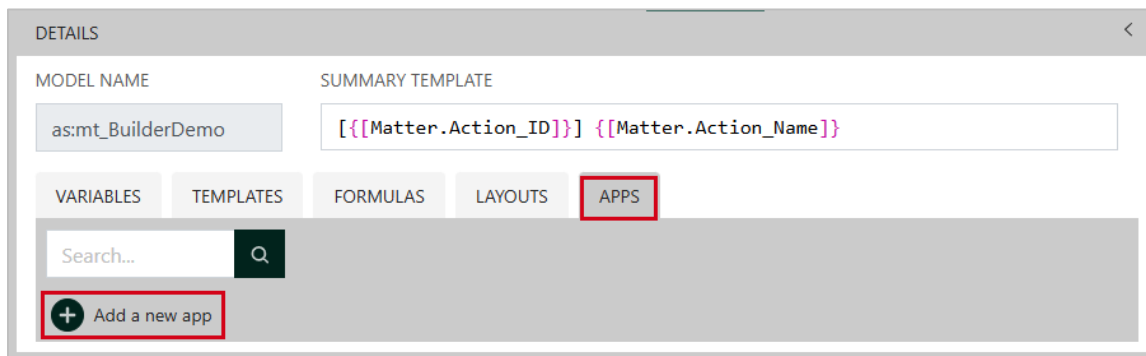
Specifically, an app consists of one or more related templates (and their components). When generating a document or group of documents, an app will determine which questions are needed (based on the contents of the underlying template) and then create and save the related document(s).

Complete the Lesson

When you created the Purchase Letter template in "Lesson 4: Open the Builder Word Designer and Create a Template," you were asked to associate it with an app. At that time, we chose not to associate it with any app. In this lesson, we will create an app and associate this letter with it. Then, in theory, other templates you might create related to the Purchase Letter could also be assigned to this app.

To do this:

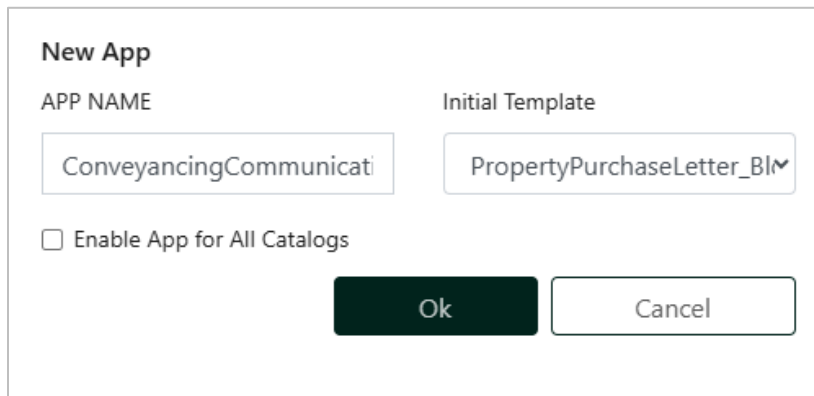
1. If you've closed the Online Workspace, reopen it. (See "Lesson 15: Launch the Builder Online Workspace" on page 64 if you need help.)
2. In the Builder Online Workspace, click the **Designer** tab and make sure **as:mt_BuilderDemo** is selected in the **Elements** list.
3. In the main section of the page, click the **Apps** tab.
4. Click **Add a new app**.



The New App window appears.

5. Enter **ConveyancingCommunications** in the **App Name** field.

6. Click the **Initial Template** drop-down list and choose **PropertyPurchaseLetter_Bldr**.



The 'New App' dialog box contains the following elements:

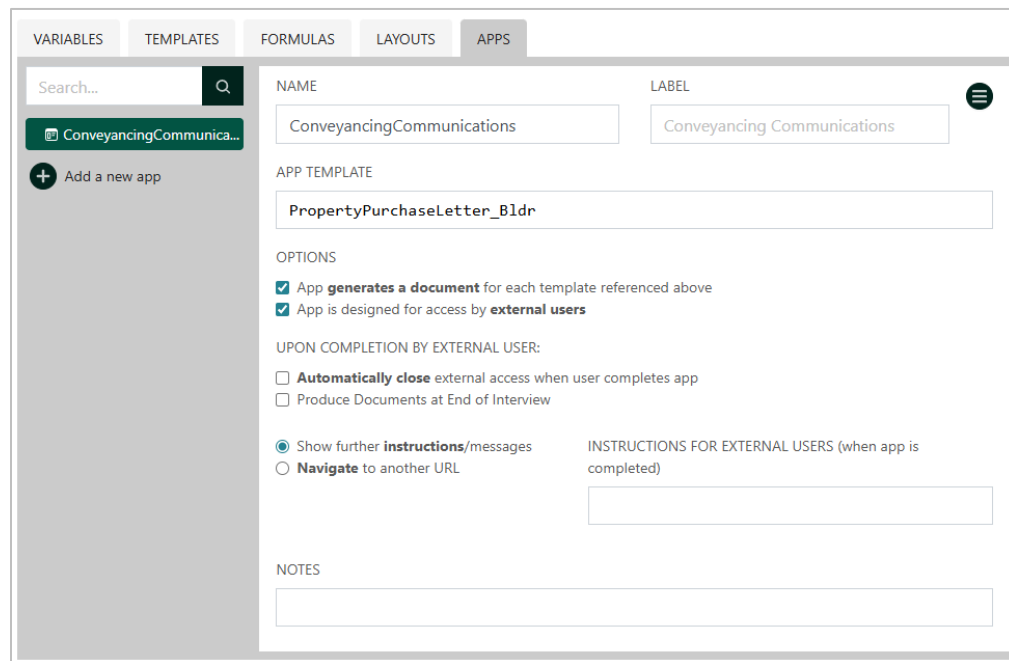
- APP NAME:** A text field containing 'ConveyancingCommunicati'.
- Initial Template:** A drop-down menu showing 'PropertyPurchaseLetter_Bldr' with a checkmark.
- ☐ **Enable App for All Catalogs**
- Ok** button (dark green)
- Cancel** button (light gray)

7. Click **OK**. The app is created and is displayed in the main part of the window so you can make further changes to it.

In the **App Template** field, you'll see the **PropertyPurchaseLetter_Bldr** template listed. If you were to build additional conveyancing templates that fall under this category (communications), you would add them to this list to associate them with this app.

8. In the **Options** section, make sure the following options are selected:
- **App generates a document for each template referenced above**
 - **App is designed for access by external users**

Your app setup should look like this:



The 'APP' configuration window shows the following setup:

- TABS:** VARIABLES, TEMPLATES, FORMULAS, LAYOUTS, APPS (selected)
- Left Panel:** Search bar, 'ConveyancingCommunica...' app card, '+ Add a new app' button.
- NAME:** 'ConveyancingCommunications'
- LABEL:** 'Conveyancing Communications'
- APP TEMPLATE:** 'PropertyPurchaseLetter_Bldr'
- OPTIONS:**
 - ☒ App **generates a document** for each template referenced above
 - ☒ App is designed for access by **external users**
- UPON COMPLETION BY EXTERNAL USER:**
 - ☐ **Automatically close** external access when user completes app
 - ☐ Produce Documents at End of Interview
 - ☒ Show further **instructions/messages**
 - ☐ **Navigate** to another URL
- INSTRUCTIONS FOR EXTERNAL USERS (when app is completed):** Empty text area.
- NOTES:** Empty text area.

9. Click the **Save** icon to save your work.

10. Click the **Catalog** tab along the top of the window.

The screenshot shows the Actionstep Builder Demo interface. At the top, there's a navigation bar with tabs: HAWORTH PATTERSON LEGAL, BUILDER DEMO, MIGRATION, DESIGNER, and CATALOG. The CATALOG tab is highlighted with a red box. Below the navigation bar, there's a sidebar on the left with a search bar and a 'BuilderDemo' button. The main area is titled 'DETAILS' and contains various configuration options for a catalog. These include: CATALOG NAME (BuilderDemo), LABEL (PLURAL) (Builder demo), CATALOG ITEM TYPE (as:mt_BuilderDemo), COLUMNS (Item Summary template, Last Modified date, Created By), ITEM DETAIL TEMPLATE, CREATE RECORD LABEL (Create record), GLOBAL INFO LABEL (Global Info), ENABLED (toggle switch), APPS ON THIS CATALOG (Conveyancing Communications), 'LIVE' VERSION (Latest), and APP SETTINGS (PER CATALOG) (External access, URL, Notification).

The **Catalog** tab is where you manage all your catalog-level details. Most of the options on this page won't be used or referenced once the app/template is added to Actionstep, so you can leave most of the options on this page as they are. However, there are a few settings you'll need to review.

11. Make sure **Enabled** and **Latest** (under "**Live**" Version) are both selected.
12. Under **App Settings (Per Catalog)**, make sure **External Access** is selected.

This is a close-up screenshot of the 'ENABLED', 'LIVE' VERSION, and 'APP SETTINGS (PER CATALOG)' sections. The 'ENABLED' toggle switch is turned on and highlighted with a red box. The 'LIVE' VERSION dropdown menu is set to 'Latest' and is also highlighted with a red box. The 'APP SETTINGS (PER CATALOG)' section shows the 'External access' toggle switch turned on, highlighted with a red box, and a URL field containing 'https://www.actionstep-builder.com/pattersonlaw/BuilderDemo/ConveyancingC-external'. There is also a 'Notification' dropdown menu set to 'Select a group'.

13. If these options are not selected, select them now and click the **Save** icon to save your changes.

Lesson 21: Test Your Template in Builder

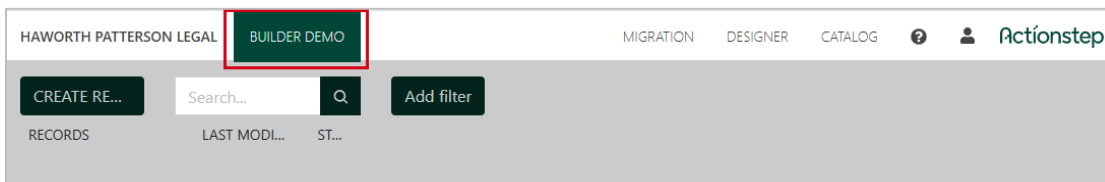
As you automate a Builder template, you should test it to make sure the interview is organized coherently, the completed document is formatted correctly, and that information is being merged as expected.

Testing your template is best done in Builder where you can easily review the appearance of interview questions and the completed document and then quickly make adjustments in the underlying Online Workspace and template file.

When testing, make sure you try different combinations of answers. For example, if you have an address block that includes a “Address Line 2”, complete two tests—one where you provide a second address and one where you don’t. Or, if you’ve got conditional instructions, test all potential scenarios to make sure the document is generated correctly for each.

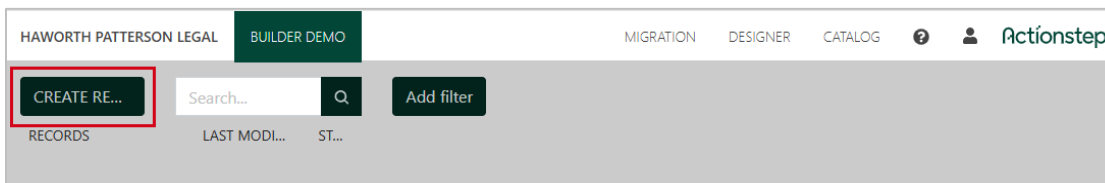
To do this:

1. If you’ve closed the Online Workspace, reopen it. (See “Lesson 15: Launch the Builder Online Workspace” on page 64 if you need help.)
2. Or, if you’re continuing from the previous lesson, refresh your browser window. (This ensures the app you just created is available for you to test.)
3. Click the **Builder Demo** tab along the top of the Builder window.



As you test-generate documents, this page will show these tests and give you options for working with the completed documents. Since you haven’t yet created a document, this page is blank.

4. Click **Create Record** and choose **Conveyancing Communications**.



The interview questions are displayed:

HAWORTH PATTERSON
LEGAL

CONVEYANCING COMMUNICATIONS

MIGRATION DESIGNER CATALOG ?

Actionstep

Matter ?

Matter ID

Matter Name

Enter the date you are sending the letter

mm/dd/yyyy

BUYER & SELLER INFORMATION

Buyer (Builder Demo)

+ Click to Add

Seller (Builder Demo)

+ Click to Add

PROPERTY & PURCHASE DETAILS

PropertyDetails

→ (click to edit)

Select the fees that apply to this purchase

☐ Fixed Professional Fee (\$2300).

☐ Property Details Search (\$825.50).

☐ Settlement Fee (\$210).

SpecialConditions

+ Click to Add

Is a tenancy noted on the contract?

☐ Yes, and tenancy continues past settlement

☐ Yes, but tenants are leaving before settlement

☐ No, there are currently no tenants

MISCELLANEOUS INFORMATION

Finish Later Create Docs

5. Answer the questions in the interview, noting the following:
- This template is not yet linked back to Actionstep, which means none of the data from Actionstep will be pre-populated in the interview fields. This is OK, since you're just verifying how the interview and generated document function and look. You can enter whatever answers you want—just make sure things look and feel correct.
 - Some fields show an **arrow** icon. These are your object model fields, which you'll remember group several variable fields into one view. Click the arrow to answer the questions.

PROPERTY & PURCHASE DETAILS

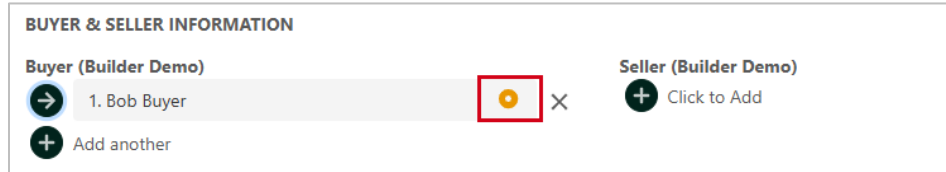
PropertyDetails

→ (click to edit)

- With participant type-specific object model fields (like *Buyer*, *Seller*, and *Matter Lawyer*), you have the option to enter multiple sets of answers (as indicated by the **plus** icon). Remember, however, the template is designed to merge only the

first set of answers. (You indicated this by using the **[0]** index marker in the field names when you inserted them in the template.)

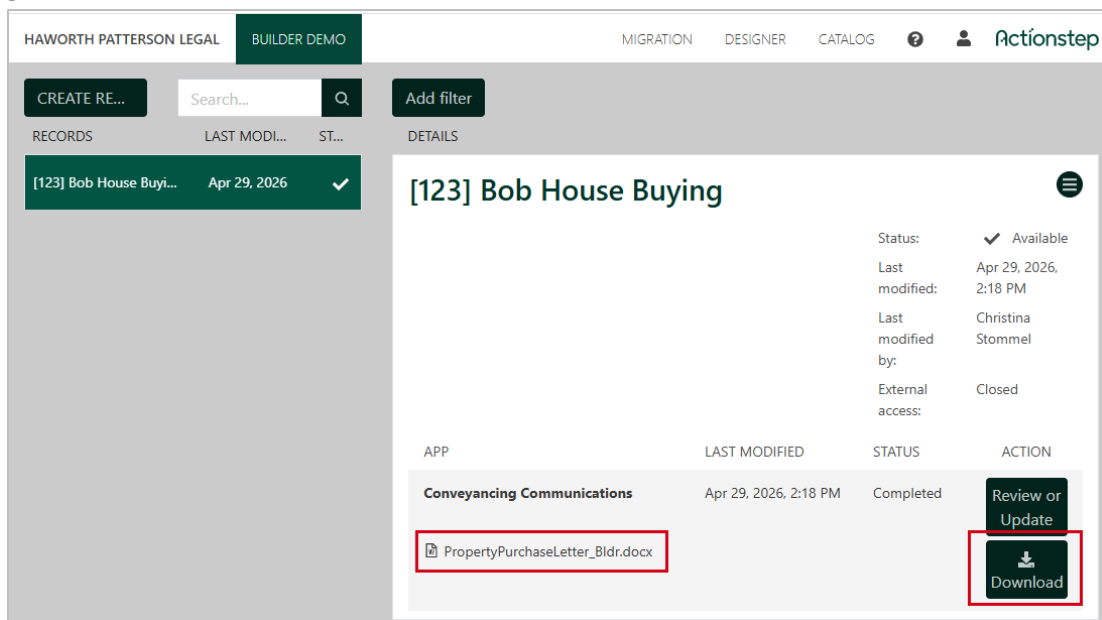
- Once you view an object model-based question, when you close it, a green or yellow icon appears next to it to let you know whether all the questions have been answered.



6. When you're finished answering the questions in the interview, click **Create Docs**.

You are taken back to the Builder Demo records page, which shows you high-level details about the interview that was completed and the document that was generated.

7. View the generated document by clicking either **Download** or the name of the generated document.



The document is saved to your system's default **Downloads** folder.

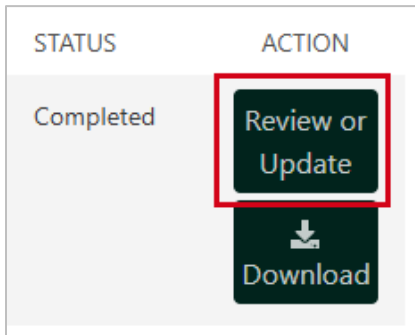
8. Open the folder and then open and review the document.

Frequently, the process of building a template is a combination of automation, testing, and fixing the issues you might find. At this point, if there are issues with the document, you can edit the template and make your adjustments. Or, if there are issues with the data being merged in the document, review those variables or formulas in the Online Workspace.

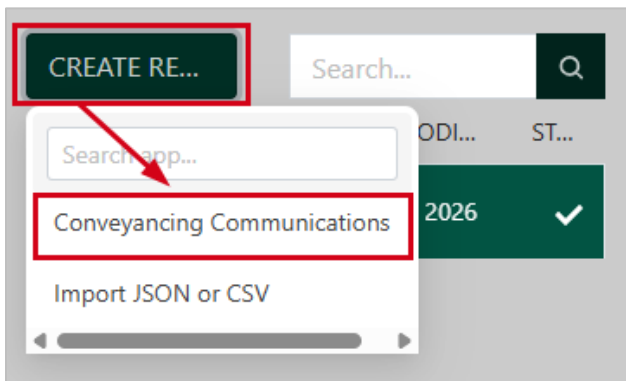
On Your Own

If you wish to test the template again, you have a few options:

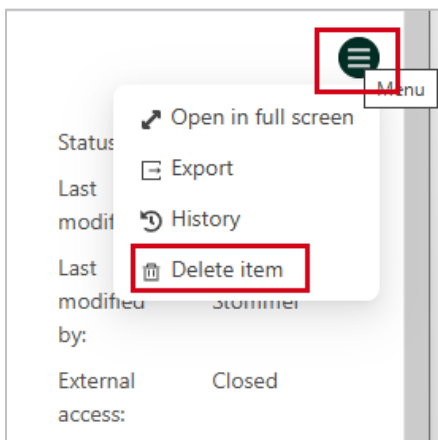
- To use the same set of answers from your previous document generation, click **Review or Update**.



- To generate a completely new interview/document, click **Create Record** and choose **Conveyancing Communications**.



- If you want to delete any records, click the menu icon for a specific record and choose **Delete item**.



Lesson 22: Add Your Templates to the Matter Type in Actionstep

The final step in automating your template is to add the app / template to your matter type in Actionstep. This way, you or your staff can use it to generate correspondence for clients or matters.

As you learned in "Lesson 20: Setting Up an App for Document Generation," apps are used to determine which questions are needed (based on the contents of the underlying template) for generating the related documents. When linking this template back to Actionstep, you will link the app and not the template.

NOTE: To ensure this app is available to associate with the matter type, please check that the following options are set in the Builder Online Workspace. (If you don't see these options, please contact your admin for help.)

In the Online Workspace:

1. Click the **Designer** tab. Select the **as:mt_BuilderDemo** catalog in the **Elements** list. Click the **Apps** tab. Make sure **App is designed for access by external users** is selected. If you make changes to the setup, save them.
 2. Click the **Catalog** tab (along the top of the window). Then, select the **BuilderDemo** catalog you want to enable in the left pane. In the **App Settings (Per Catalog)** section, make sure **External Access** is selected. If you make changes to the setup, save them.
 3. Click the user icon in the top-right corner of the page and choose **API keys** from the menu of options that appears. Click the edit icon to edit the details. In the **Permissions** section, make sure the **Read/Write Access** checkbox for the **BuilderDemo** catalog is selected. If you make changes to the setup, save them.
-

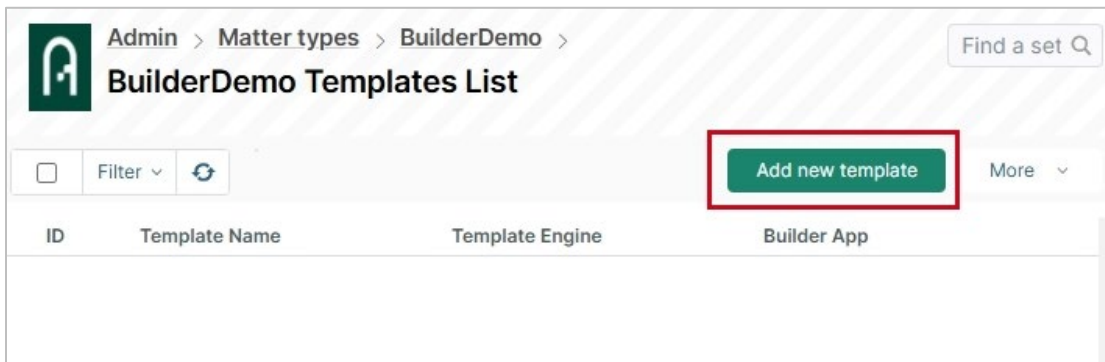
To associate the app with the matter type:

1. Open your instance of Actionstep.
2. Go to **Admin > Matter types** and click **Settings** for the **BuilderDemo** matter type.



The BuilderDemo page appears.

- Click **Manage** next to **Document templates**.
- Click **Add new template**.



The New Document Template page appears.

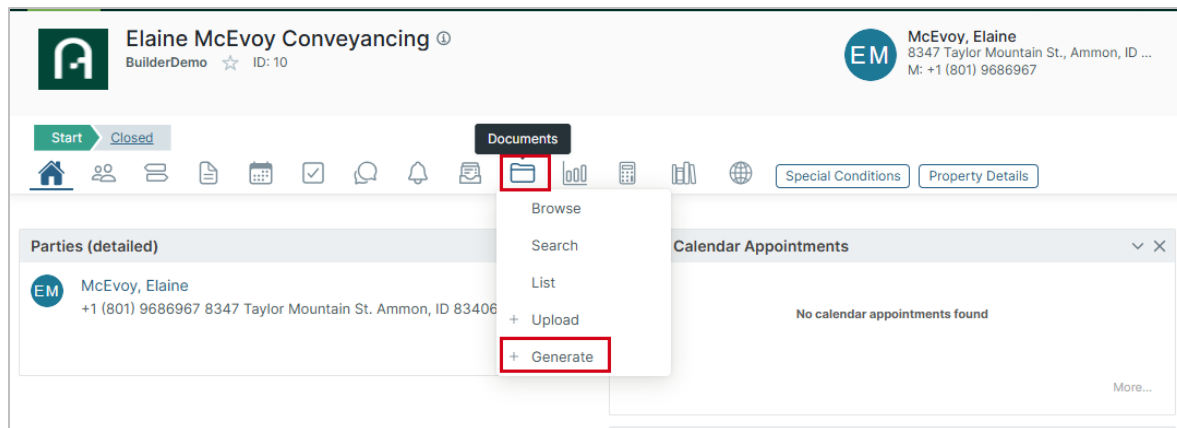
- Enter **Conveyancing Communications** in the **Name** field. This name is what users will see when they generate the document from the matter.
- Click the **Template Engine** drop-down list and choose **Builder**.
- Click the **App** drop-down list and choose **ConveyancingCommunications (app) – BuilderDemo (catalog)**.

The page should look like this:

- Click **Save** to save your changes.

Now, you and the users in your firm can select this app/template when you need to generate a letter for a client or matter.

You can do this by viewing a matter and then choosing **Generate** from the **Documents** menu.



You would then click the **Choose template** drop-down list and choose **Conveyancing Communications (Builder)** from the list of available options:

If you want to test generating a document now, you will first need to create a "throwaway" matter that's associated with this matter type. However, since each firm's policies on matter management are different, we do not cover this step in this training.

When generating the document, you may be presented with additional options, especially if there might be existing answers. These options might be:

- **Use Existing Interview:** This option uses the information that was entered the last time the interview was completed.
- **Use Existing Interview & Refresh:** This option uses the information that was entered the last time the interview was completed, but if changes have been made to data stored in Actionstep, it will attempt to pull that updated information for use with the latest document.
- **Start from Blank:** This option presents a completely blank interview.

The message may also include information about previous interviews that have been completed.

Additional Resources

Congratulations! You have created a basic template using Actionstep Builder! But there's still much to learn. The following resources are available to help you on your journey:

- [Actionstep Builder Knowledge Base](#)
- [Actionstep Builder Training Path](#) (in Actionstep Academy)
- [Knackly Learning Center](#) (hosted by Knackly)

Appendix

How the BuilderDemo Matter Type Was Created in Actionstep

The following shows how the BuilderDemo matter type was customized for the purposes of this tutorial:

Admin > Additional Settings > Participant Types:

- Buyer_Bldr
- Matter Lawyer Bldr
- Seller Bldr

Admin > Matter Types > BuilderDemo > Matter Type Settings:

Matter type name: BuilderDemo

Description: A set of demos to show the basics of Builder

Enabled: On

Parties:

- **Buyer Bldr**
- **Client** (set as **Primary**)
- **Matter Lawyer Bldr**
- **Seller Bldr**

Admin > Matter Types > BuilderDemo > Matter Data:

Data collection: Property Details (one row)

- PropertyAddress (Single line text)
- PurchasePrice (Money)
- Deposit (Money)

Data collection: Special Conditions (multi-row)

- Details (Single line text)
- DueDate (Date)