

What is the Template Editor?

The Template Editor is a separate Windows program that runs with PCLaw that allows you to modify templates for bills, labels, past due notices, receipts, checks, deposit slips and financial statements in PCLaw.

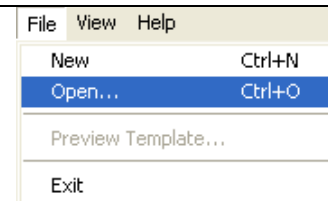
A template is a blueprint for the text, graphics, and formatting of an often used bill, receipt, reminder notice or cheque. Use the Template Editor to customize the various templates within PCLaw.

How to Access the Template Editor?

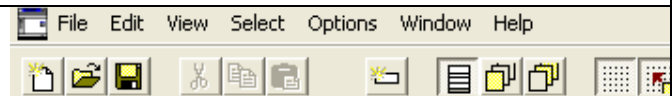
Access: Tools – Template Editor

Notice that all template extensions start with the letter “R”. All templates are saved in “DATA\STATDATA”.

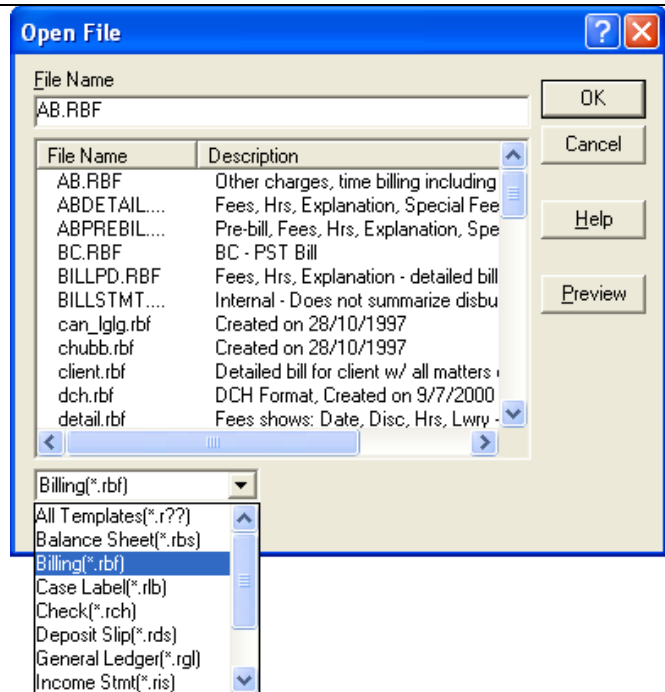
In the Template Editor, open an existing billing template. Click File, Open.



Or click the open button on the Toolbar.



In the “Files of Type” drop down box, specify to view only the billing templates.

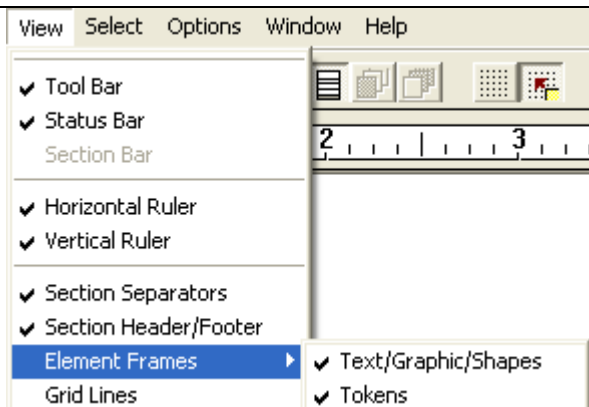


Elements

What is an Element? An Element in PCLaw is the place holder of the data on a template. All items placed on a template for display need to be contained within an element. There are five types of elements that you can create:

- Text – Text elements are user defined items. These allow the user to type in whatever text you require and have it display on the template.
- Token – Token elements extract data from the PCLaw database and display it on the template.
- Shape – Shape elements display horizontal or vertical line, or rectangles.
- Graphic – Graphics elements can display company logos or other “graphic” on the template.
- Formula - Formula elements allow two or more tokens to be included in a mathematical formula to produce a numerical value.

Frames show the borders around each element. Use the frames to determine if element are overlapping. To have the Frames of the element always show: Click View – Element Frames – Select Text/Graphic/Shape or Token or Both. Hint: Work with the Tokens frame selected – This allows the user to determine which item they are working with – either Text/Graphic/Shape or a Token.



The first section of the bill shows Law Firm information. The firm information is drawn from *Options, System Settings, Firm*.

 A screenshot of the PCLaw software's bill form. The form is titled 'Firm Name' and contains fields for 'Firm Addr Line 1', 'Firm Addr Line 2', 'Firm City, Province', and 'Postal Code'. Below these are fields for 'Ph: Firm Bus #', 'Fax: Firm Fax #', 'Client Name Bill', 'Inv Date', 'Client Addr Line 1', 'Client Addr Line 2', 'Client City, Province', 'Postal Code', 'Attention: Client Attention', 'File #', 'Matter #', 'Inv #', and 'Inv #'. The form is displayed within a window titled 'Miscellaneous'.

The lower section of the bill shows the Tax Information. The firm's tax rates are drawn from *Options, System Settings, Tax Tab*.

DATE	DESCRIPTION	HOURS	AMOUNT	LAWYER
MATTER	Matter #			
RE:	Desc			
Fee Date	Fee Expl	Fee Hrs	Fee Amt	Lwyr Inst
MATTER TOTALS:		Hours	TotalBefDisc	
Totals		Tot Hrs	otFeeBefDisc	
DiscExp		DiscFees		
Total Fees After Discount		FeeAftDisc		
Total GST on Fees		TaxAftDisc		

How to change a Text Element?

If you are not comfortable making changes to your billing templates, please contact your PCLaw consultant or technical support for assistance. It is recommended that you save your template under a new name to maintain a copy of the original layout.

Double click on "Total GST on Fees" to display the element properties window. Notice that the element type displays "Text".

This is where you can make changes to the text elements on the billing template. Click in the element specification window and change "Total GST on Fees" to "Total GST/HST on Fees". Select ok and repeat for any other item/s as required.

After making changes, you must select file and save before you exit the template editor, otherwise all changes made will be lost.

0	1	2	3	4	5	6	7
MATTER TOTALS:							
Totals							
DiscExp							
Total Fees After Disc							
Total GST on Fees							
Total Sales Tax on Fees							

Element Properties

Element Type	Element Specification
Text	Total GST on Fees
Token	
Shape	
Graphic	
Formula	

Text is printed on your output exactly as you type it into the template

Alignment

OK Cancel Help