

LawMaster Merge and Reverse Merging – PDF Forms

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Introduction

LawMaster provides the ability to merge PDF fillable forms directly (as opposed to merging a Word document which is then converted to PDF), and to Reverse Merge PDF forms and their data back into the LawMaster database.

Why would I want to do this?

Forms can be sent to clients or prospective clients, or placed on your website for download so that someone other than you can fill them in and send them back to you. Once returned, you can get the data into LawMaster with a simple import. No retyping. Any data errors are not yours.

Also, your own staff can fill in a PDF form in an interview situation, for example, creating a Will or perhaps a Binding Financial Agreement.

Places in LawMaster that data can be saved

- Matters as Matter Attributes – e.g. answers to a Will questionnaire
- To create new Matters – for new or existing clients
- To create new Entities – e.g. new clients
- To create new New Client Enquiries

Applications that can be used to create Reverse Merge PDF forms

Forms may be created with Adobe Acrobat or other pdf creator such as Nitro Pro. Forms created with some programs other than Adobe Acrobat **may not be able to be saved once filled in if the end user has Adobe Acrobat Reader** and therefore will not be able to be reverse merged. There are free readers such as Nitro PDF and Foxit Reader with which they **will be able to be saved**.

Forms created with Adobe Acrobat will have no restrictions. As at the date of writing, Nitro PDF Pro V9 and above also have no restrictions.

Creating and Maintaining Reverse Merge PDF forms

Important Rules

Each PDF template in LawMaster needs to be uniquely identified

This is done using a combination of the title, author and subject found in the properties of the template – ie, the actual PDF file. **If this combination is not unique, then you will get an error** on Reverse Merge and/or on Registering the template.

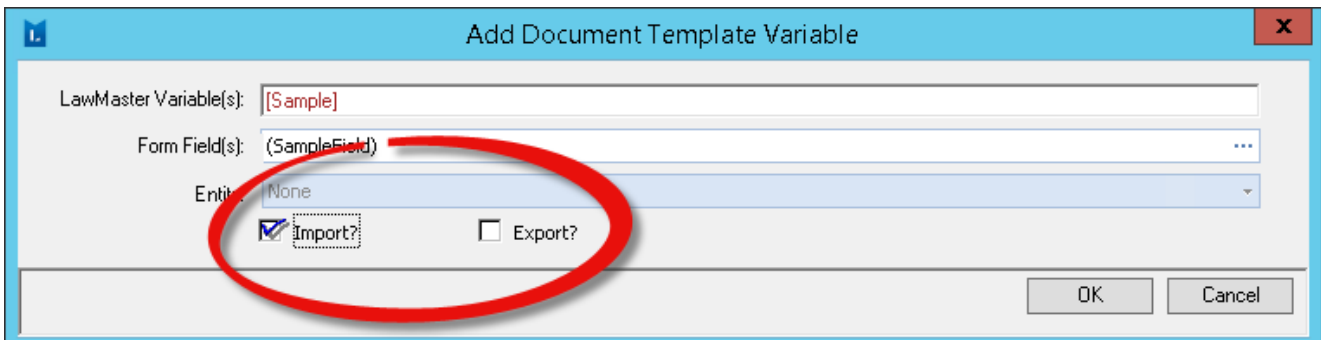
Do this with your PDF editor. You would usually click on File > Properties or something like that – it depends on which PDF editor you are using.

PDF forms that have been filled in and returned to you can have their file names changed and this will not affect the Reverse Merging. Only the Title, Author and Subject are used for matching the incoming PDF with your PDF templates.

Only Template or Database Data Group variables can be Reverse Merged [DataGroup](#)

Import, Export or Both?

The Add Document Template Variable window has two checkboxes which are used to define whether the form field/LawMaster attribute interaction imports, exports or both. Exporting might be thought of as a regular merge. Data within LawMaster is exported to the PDF just like when you merge a Word document. Importing is bringing data from a PDF form into LawMaster with a Reverse Merge.



The screenshot shows a dialog box titled "Add Document Template Variable". It contains the following fields and controls:

- LawMaster Variable(s): [Sample]
- Form Field(s): (SampleField) ...
- Entity: None
- Import? Export?
- OK and Cancel buttons.

A red circle highlights the "Import?" and "Export?" checkboxes.

Troubleshooting

A Reverse Merge template I have been using for a while suddenly doesn't work

It is likely that your client has unintentionally changed the Title, Author or Subject in the PDF properties. There are some PDF readers, usually web or phone/tablet based, which change or blank out these details.

In these cases you may get an error message like the following.



Unable to save folios

Matter not on file
ERROR Raised by usp_rm_mfo_Before

Please have your client's use a better PDF reader. An already filled in form may be repaired by manually editing the Title, Author and Subject to match your Reverse Merge template.

PDF forms that have been filled in and returned to you can have their file names changed and this will not affect the Reverse Merging. Only the Title, Author and Subject are used for matching the incoming PDF with your PDF templates.

Step by Step Guide to Create a Reverse Merge PDF form

Step 1 – Create PDF

Do I need to learn anything new?

You will need to learn a little PDF creation here. It's not hard though. Check out one of these links, depending on which product you will be using:

<https://helpx.adobe.com/acrobat/how-to/convert-word-excel-paper-pdf-forms.html?set=acrobat--fundamentals--pdf-forms>

<http://support.nitropdf.com/entries/23734711-Create-and-Edit-Form-Fields>

[Applications that can be used to create Reverse Merge PDF forms](#)

Identify your template

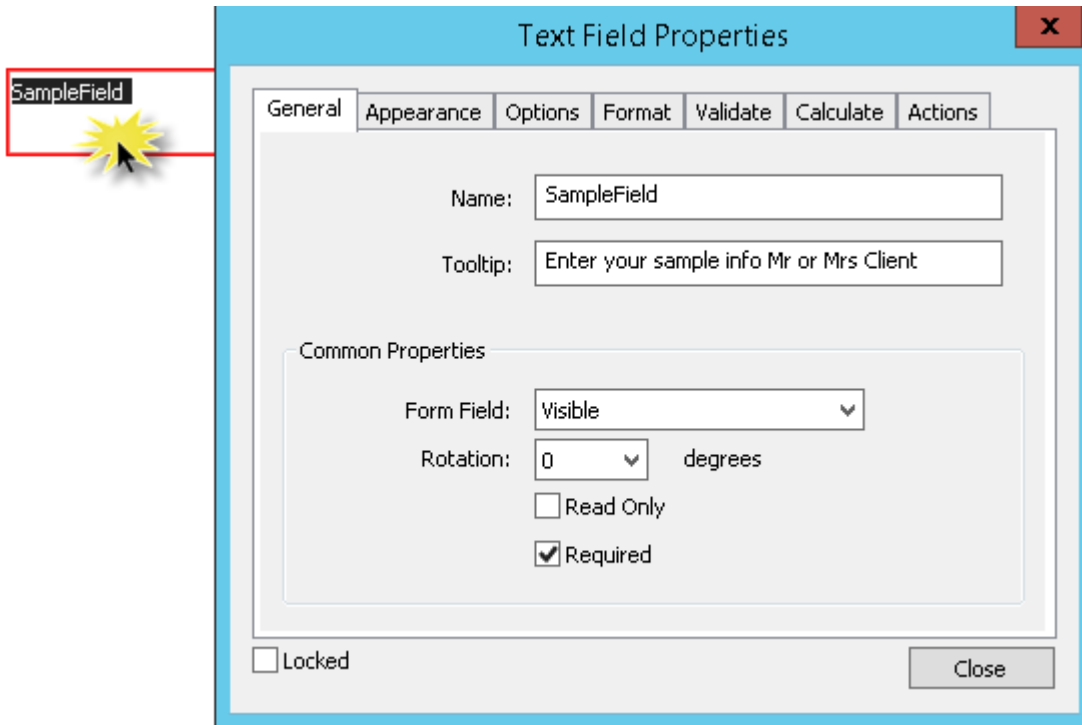
[Each pdf template in LawMaster needs to be uniquely identified.](#) Do this up front so as to avoid problems later.

Putting fields into your PDF form

Form Fields are created and named in the PDF Form template.

The names of your Form fields are the names you will be mapping back to LawMaster.

You can make your life a little easier by naming your Form fields the same as your LawMaster Attributes or system variables.

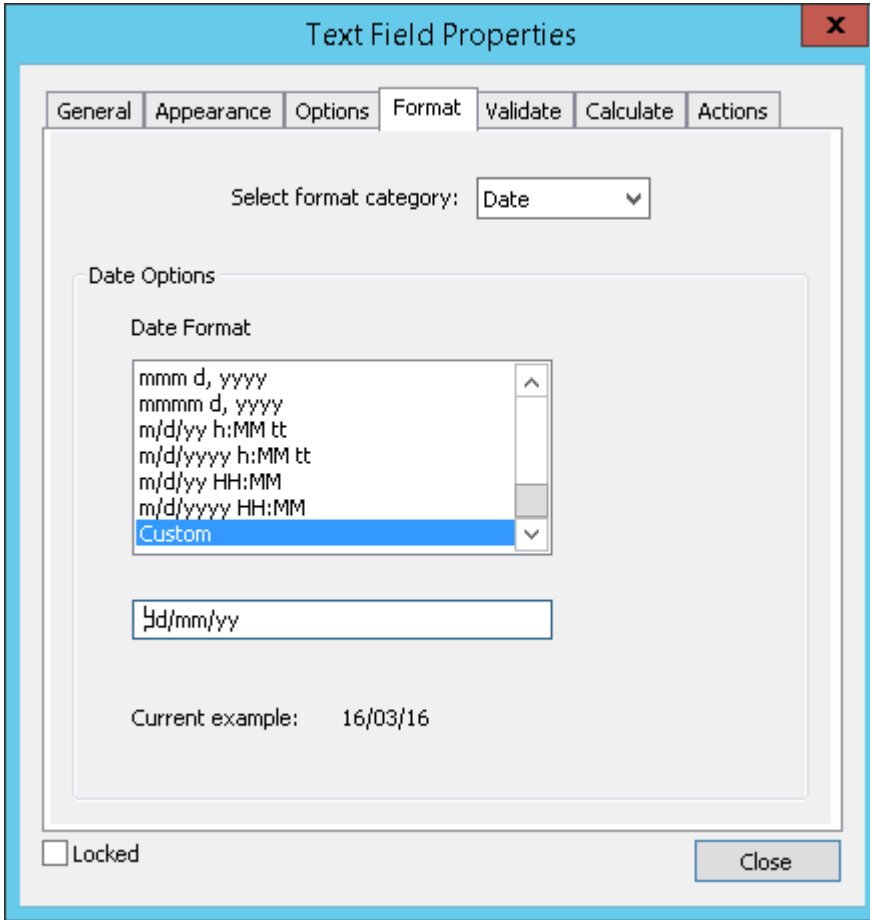


The above screenshot is taken from a PDF editor where the window in front is the field properties window for the field seen behind.

Date and number fields

PDF creators are able to control the input of data into PDF form fields. This is important and useful for Reverse Merge because you will often want to bring data such as dates and numbers into LawMaster.

Use the Format and Validate controls to ensure you don't get any data type mismatches when trying to Reverse Merge. Below is an example of a date formatted field.



Step 2 – Create the LawMaster Template and upload the PDF

Go to Main Menu > Workflow Development > Document Templates and then from the context menu click Add. You will have already created your PDF Form in Step 1 above so now it is time to add it as a LawMaster Template.

Notice that the name of the template within LawMaster will be **Something.pdf**

Add Document Template

Name: RMSimple.pdf Discoverable? Temporary Document? Active?

Register Type: I - Inwards Correspondence Document Type: LM LawMaster

Information Type: ...

Description: Simple PDF Form for merging

Retention Period: 0 days Group: G General

Document Filename (Override):

Save Filename (Override):

To:

Last Registered On: By: With Template:

Document Upload: C:\Users\abaldwin\Documents\RMSimple.pdf

Notice it's a PDF Form that is being uploaded.

Step 3 – Save (OK), upload and Register for the first time

Click OK to upload and save your LawMaster Template, and then Register it, just like you would a Word Template.

At this stage, you should get the message that the Template was successfully registered but that there were *no variables in the document*. This is ok. We have to do some mapping before the system knows about the variables.

Document Template Registration Status

No. of Hits: 1

Drag a column header here to group by that column

Type	Brand	Path	Variable	Description
RevM - Sample.pdf		C:\Use...		Was successfully registered - No variables in this document

Close

Step 4 – Map the PDF form fields to LawMaster Attributes or System Variables

Starting the Mapping

Mapping your form fields to your LawMaster Attributes and various accessible system fields is done via the Mapped Attributes tab on the Modify Document Template window found from the Document Templates screen.

Right click on your new LawMaster template in the Document Templates window and Modify. Navigate to the Mapped Variables tab then right click again to add a new mapping.

Modify Document Template
✕

Name: Discoverable? Temporary Document? Active?

Register Type: Document Type:

Information Type:

Description:

Retention Period: days Group:

Document Filename (Override):

Save Filename (Override):

To:

Last Registered On: By: With Template:

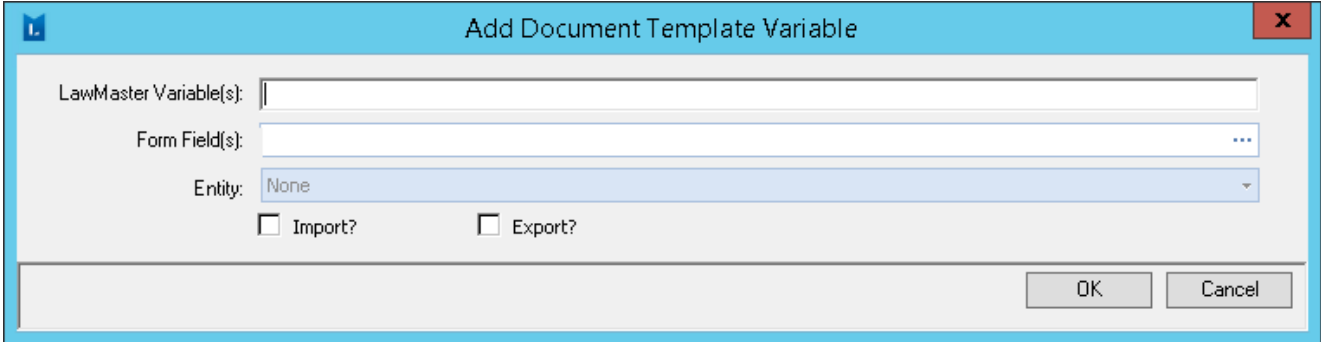
Document Upload:

Drag a column header here to group by that column

Form Fields	Variable	Import	Export	Description	Last Updat...	Last Updat...
<div style="display: flex; align-items: center; justify-content: center;"> <div style="border: 1px solid #0070C0; padding: 5px; background-color: white;"> <ul style="list-style-type: none"> <input type="button" value="Add"/> Ctrl+A <input type="button" value="Modify"/> Ctrl+M <input type="button" value="Delete"/> Ctrl+D <input type="button" value="Select All"/> Ctrl+Shift+A <input type="button" value="Unselect All"/> Ctrl+Shift+U <li style="border-top: 1px solid #0070C0;"><input type="button" value="Summary"/> </div> </div>						

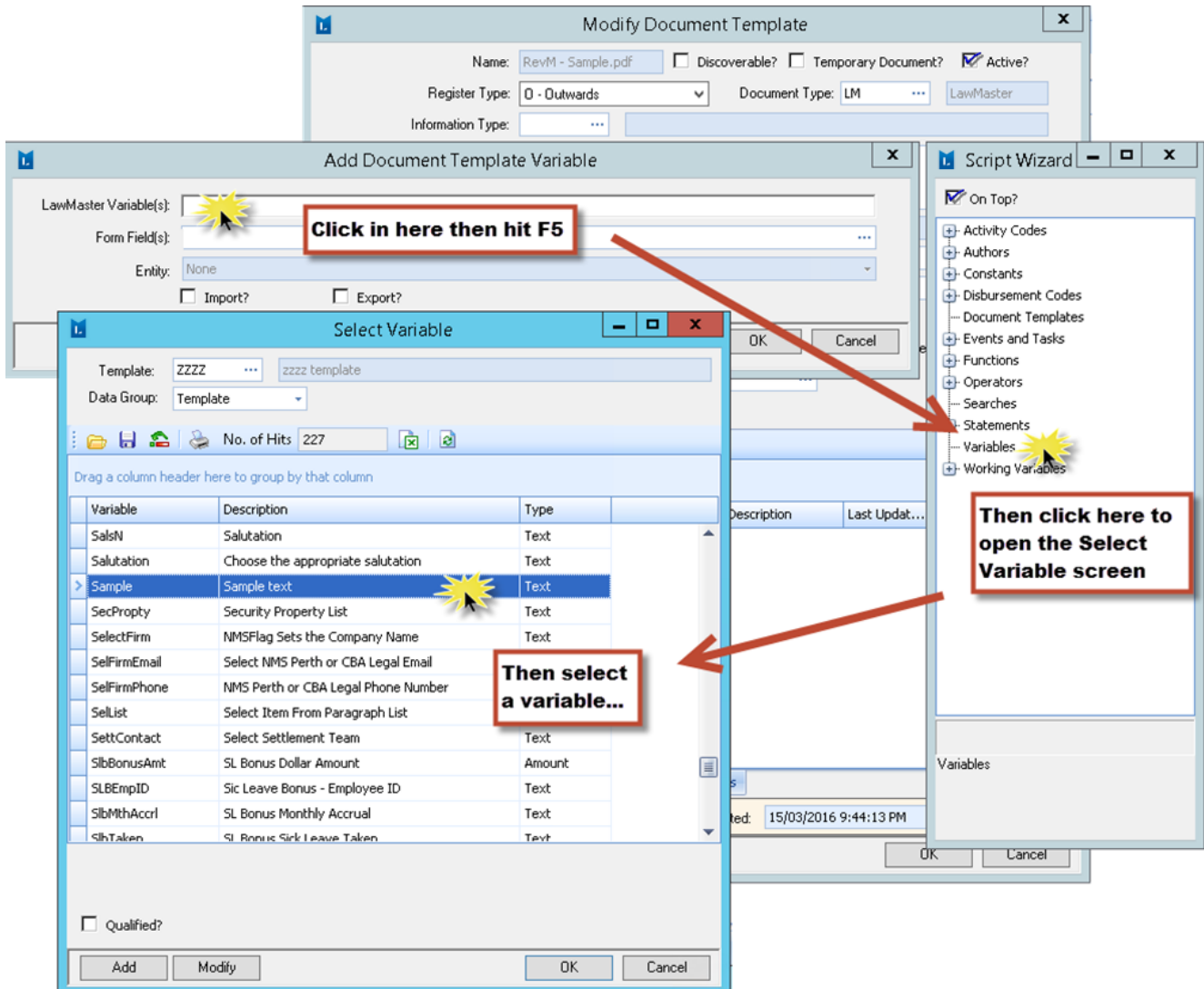
Last Updated: By:

This action will bring up the Add Document Template Variable window. This is where we map the field in the form to the variable in LawMaster.



Reverse Merge Matter Attributes

Put your cursor in the LawMaster Variable field and press F5. This brings up the familiar Script Wizard window from which you can select a variable.



Click in here then hit F5

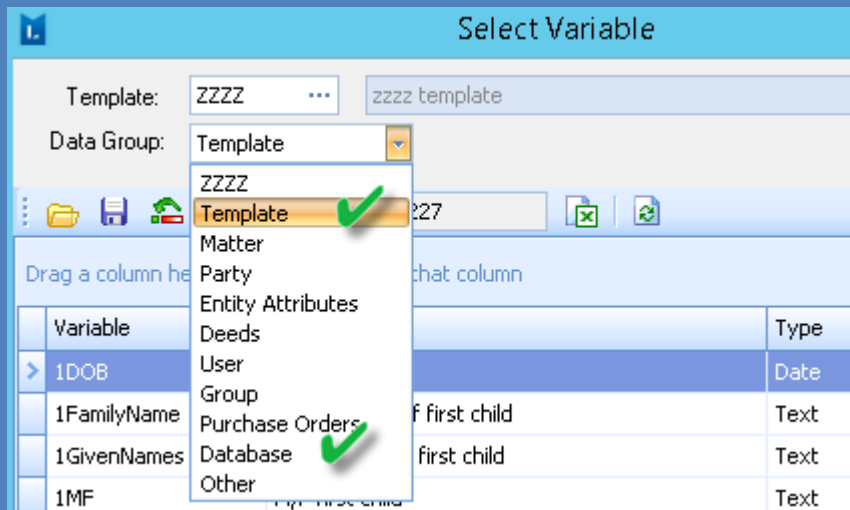
Then click here to open the Select Variable screen

Then select a variable...

Variable	Description	Type
SalsN	Salutation	Text
Salutation	Choose the appropriate salutation	Text
Sample	Sample text	Text
SecPropy	Security Property List	Text
SelectFirm	NMSFlag Sets the Company Name	Text
SelfirmEmail	Select NMS Perth or CBA Legal Email	Text
SelfirmPhone	NMS Perth or CBA Legal Phone Number	Text
Sellist	Select Item From Paragraph List	Text
SettContact	Select Settlement Team	Text
SibBonusAmt	SL Bonus Dollar Amount	Amount
SLBEmpID	Sic Leave Bonus - Employee ID	Text
SibMthAccr	SL Bonus Monthly Accrual	Text
SibTaken	SL Bonus Sick Leave Taken	Text

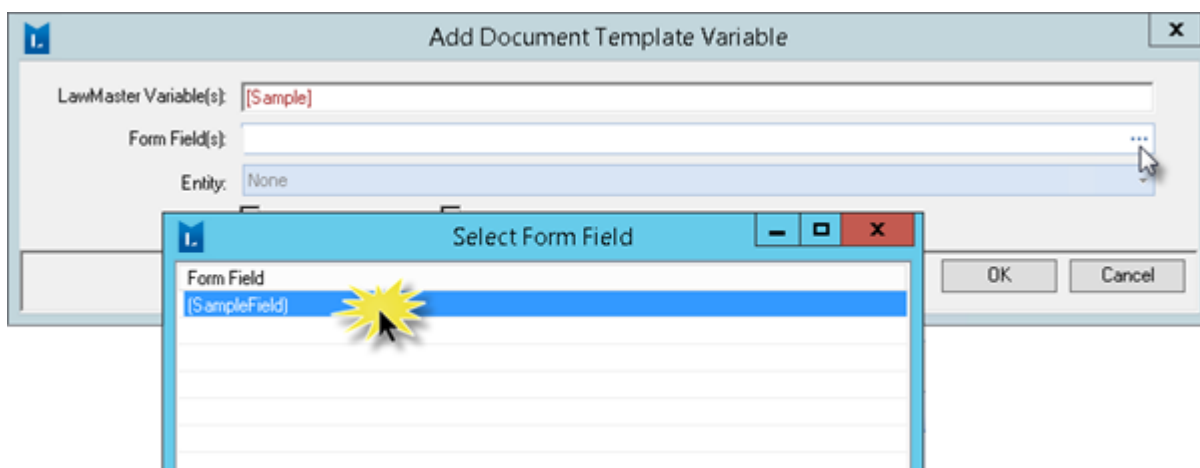
This places the LawMaster variable name in the LawMaster Variable field in the Add Document Template Variable window.

Note that LawMaster Attributes are found in the Template Data Group. LawMaster variables found in any of the other groups, apart from the Database group, can only be used to export.



Next, you can click the ellipsis (...) at the end of the Form Fields field to bring up the list of available Form fields in the PDF you created earlier.

Choose the field you would like to map to the LawMaster variable you have chosen.



[Import, Export or Both?](#)

What if I want to add [Entities](#), [Matters](#), [Reverse Merging new 2](#) or [New Client Enquiries](#) instead?

Reverse Merge new Entities

If you haven't already tried mapping to [Matter Attributes](#), it is best to get the hang of that first.

To Reverse Merge Entities, there are two steps to the mapping; [Defining Entities](#) and then [Mapping Entity fields](#).

Defining Entities

Right click on your LawMaster template in the Document Templates window and Modify. Navigate to the Entities tab then right click again to add a new Entity.

Modify Document Template
✕

Name: Discoverable? Temporary Document? Active?

Register Type: Document Type:

Information Type:

Description:

Retention Period: days Group:

Document Filename (Override):

Save Filename (Override):

To:

Last Registered On: By: With Template:

Document Upload:

Drag a column header here to group by that column

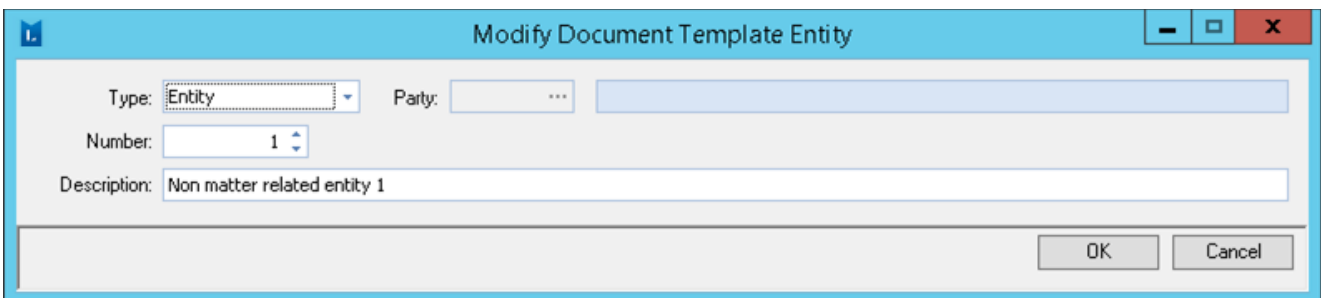
Type	Matter Party Type	Number	Description
<div style="border: 1px solid #ccc; padding: 5px; width: 200px; margin-left: auto; margin-right: auto;"> <ul style="list-style-type: none"> <input type="button" value="Add"/> Ctrl+A <input type="button" value="Modify"/> Ctrl+M <input type="button" value="Delete"/> Ctrl+D <input type="button" value="Select All"/> Ctrl+Shift+A <input type="button" value="Unselect All"/> Ctrl+Shift+U <input type="button" value="Summary"/> ▶ </div>			

Last Updated: By:

There are 6 Entity Types available

- **Entity** – creates an Entity in the system only

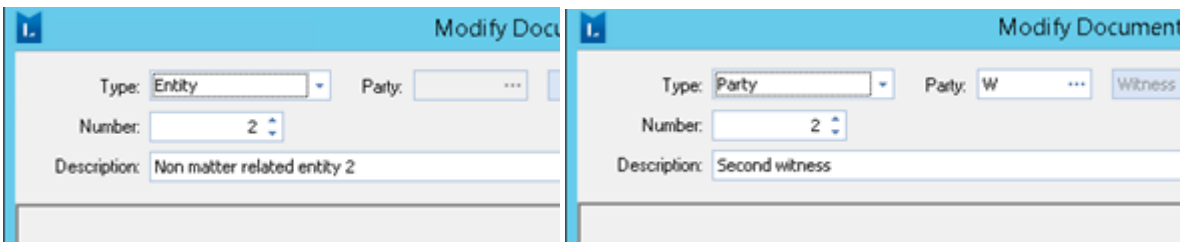
- **Party** – creates an Entity and then adds it as a Matter Party (this is used in conjunction with the creation of a new Matter by Reverse Merge – [see also](#))
- **Client** – creates an Entity and then adds it as the Client to a new Matter (this is used in conjunction with the creation of a new Matter by Reverse Merge – [see also](#))
- **Matter Contact** – creates an Entity and then adds it as the Matter Contact to a new Matter (this is used in conjunction with the creation of a new Matter by Reverse Merge – [see also](#))
- **Billing Entity** – creates an Entity and then adds it as the Billing Entity to a new Matter (this is used in conjunction with the creation of a new Matter by Reverse Merge – [see also](#))
- **Account To** – creates an Entity and then adds it as the Account To Entity to a new Matter (this is used in conjunction with the creation of a new Matter by Reverse Merge – [see also](#))



You can collect information on multiple Entities on just one Reverse Merge PDF form

Of course each Matter can only have one Matter Contact, one Billing Entity and one Account To Entity but it may have multiple Matter Parties and it may have multiple Clients via the use of Plural Entities.

For each Entity your form Reverse Merges, you will need to define an Entity. With the exception of Clients, where there is more than one Entity of a type, you will need to number them for the mapping to work.



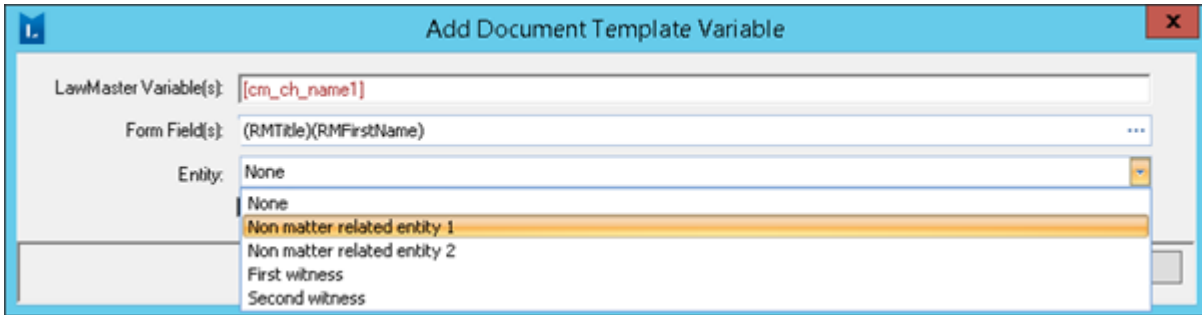
For multiple clients, the system will add each Entity individually and then create a plural Entity of all of them before adding them to a matter.

You can create the Client and the Matter from one Reverse Merge PDF form

Yes. If your form has any matter fields mapped, a matter will be created. If it also has any Client, Matter Contact, Billing Entity, Account To or Matter Parties, then those Entities will be added to their respective places in the matter after being created as Entities in the system.

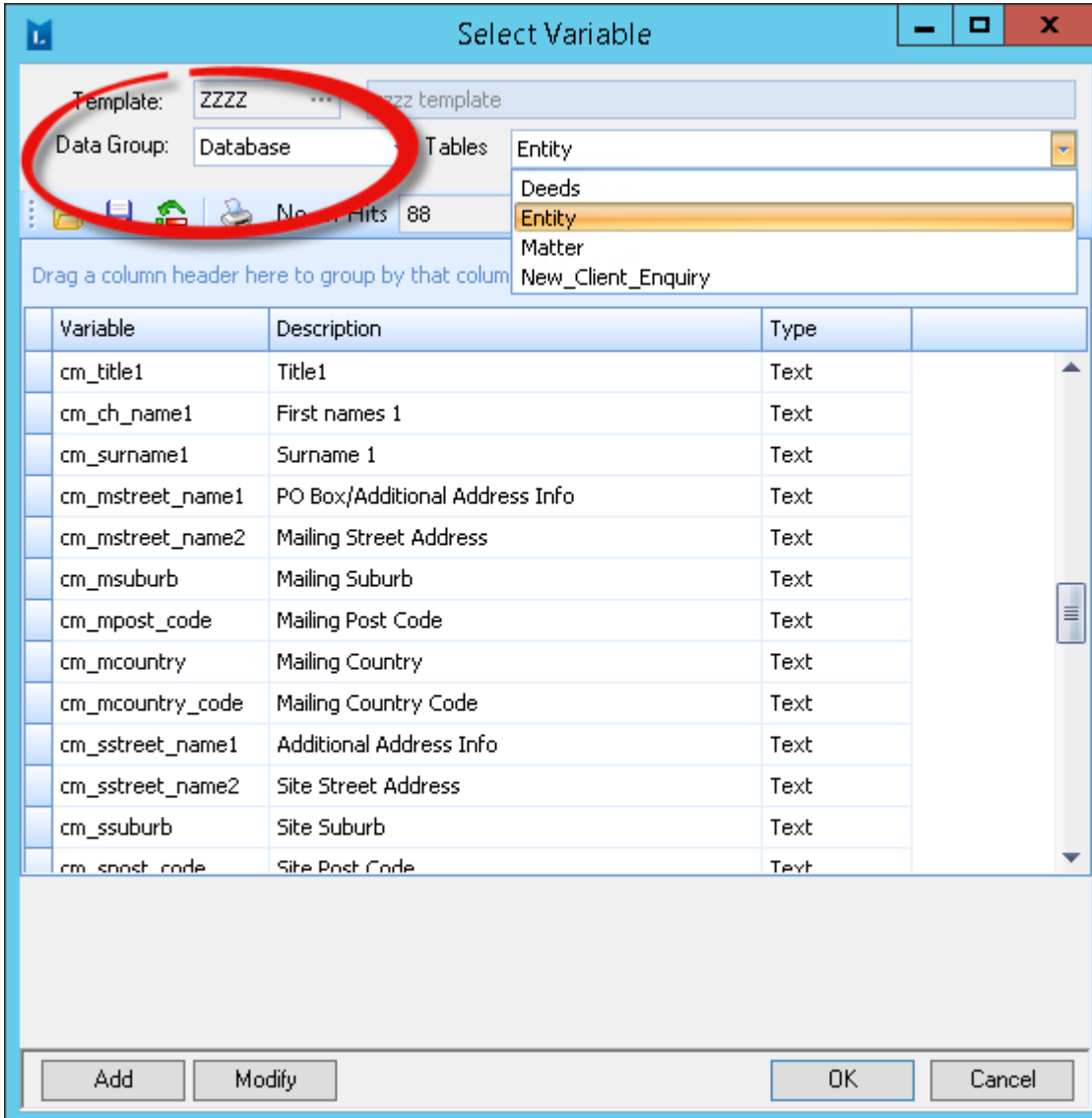
Mapping Entity fields

Mapping Entity fields is similar to [mapping Matter Attributes](#) except that once you have put an Entity related variable from the Database Data Group in the LawMaster Variable field on the Add Document Template Variable window, the Entity field will be unlocked and the Entities [that you have defined](#) will be available to map to.



The screenshot shows a window titled "Add Document Template Variable". It contains three main input fields:

- LawMaster Variable(s):** [cm_ch_name1]
- Form Field(s):** (RMTitle)(RMFirstName)
- Entity:** A dropdown menu is open, showing a list of entities: "None", "Non matter related entity 1", "Non matter related entity 2", "First witness", and "Second witness". "Non matter related entity 1" is highlighted in yellow.



Template: ZZZZ
Data Group: Database

Tables: Entity, Deeds, Entity, Matter, New_Client_Enquiry

Variable	Description	Type
cm_title1	Title1	Text
cm_ch_name1	First names 1	Text
cm_surname1	Surname 1	Text
cm_mstreet_name1	PO Box/Additional Address Info	Text
cm_mstreet_name2	Mailing Street Address	Text
cm_msuburb	Mailing Suburb	Text
cm_mpost_code	Mailing Post Code	Text
cm_mcountry	Mailing Country	Text
cm_mcountry_code	Mailing Country Code	Text
cm_sstreet_name1	Additional Address Info	Text
cm_sstreet_name2	Site Street Address	Text
cm_ssuburb	Site Suburb	Text
cm_spost_code	Site Post Code	Text

Buttons: Add, Modify, OK, Cancel

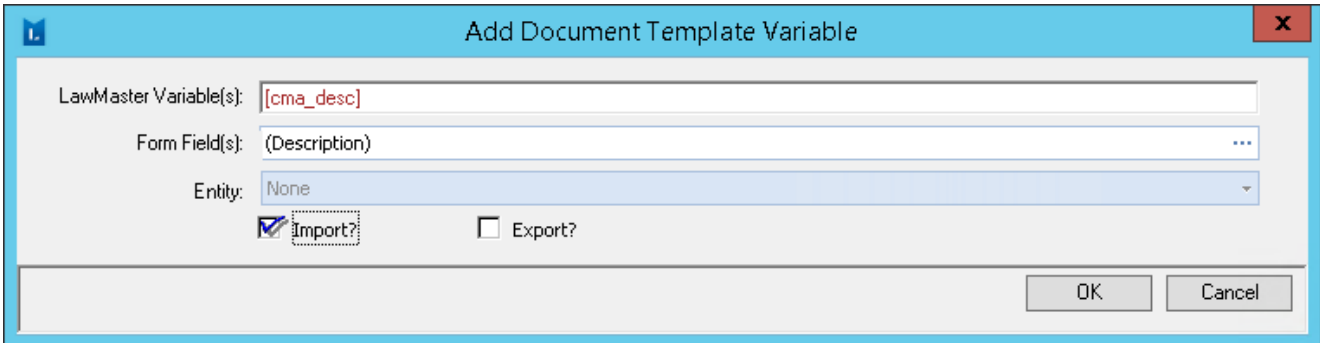
How many of the Entity fields in LawMaster do I need to have on my form?

You can map as many or as few of the available Entity related fields as you like because the form is Reverse Merged, each defined Entity triggers the standard Add Entity screen that users would see if they added an Entity from the Entity Search screen. The difference is that whatever data has been mapped and exists in the PDF form (ie, your client might not fill out every field) will be pre-filled on the Add Entity screen.

Reverse Merge new Matters

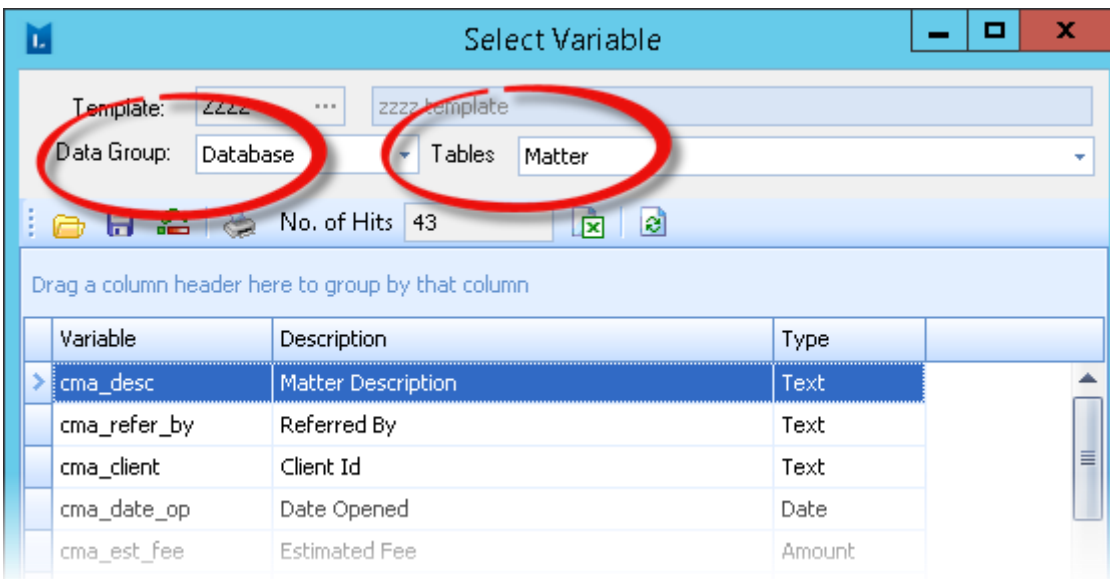
If you haven't already tried mapping to [Matter Attributes](#), it is best to get the hang of that first.

Mapping Matter fields is similar to [mapping Matter Attributes](#) except that you will be putting a Matter related variable from the Database Data Group in the LawMaster Variable field on the Add Document Template Variable window.



The screenshot shows a dialog box titled "Add Document Template Variable". It contains the following fields and options:

- LawMaster Variable(s): [cma_desc]
- Form Field(s): (Description)
- Entity: None
- Import? Export?
- Buttons: OK, Cancel



The screenshot shows a dialog box titled "Select Variable". It contains the following fields and options:

- Template: zzzz (circled in red)
- Data Group: Database (circled in red)
- Tables: Matter (circled in red)
- No. of Hits: 43
- Table with columns: Variable, Description, Type

Variable	Description	Type
cma_desc	Matter Description	Text
cma_refer_by	Referred By	Text
cma_client	Client Id	Text
cma_date_op	Date Opened	Date
cma_est_fee	Estimated Fee	Amount

How many of the Matter fields in LawMaster do I need to have on my form?

You can map as many or as few of the available Matter related fields as you like because when the form is Reverse Merged, the standard Add Matter Details screen that users would see if they added a Matter from the Matter Search screen is triggered. The difference is that whatever data has been mapped and exists in the PDF form (ie, your client might not fill out every field) will be pre-filled on the Add Matter Details screen.

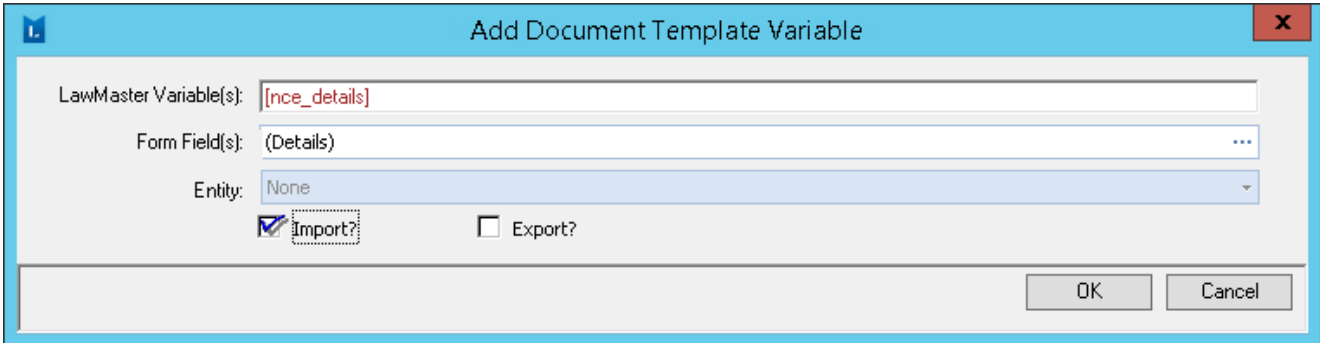
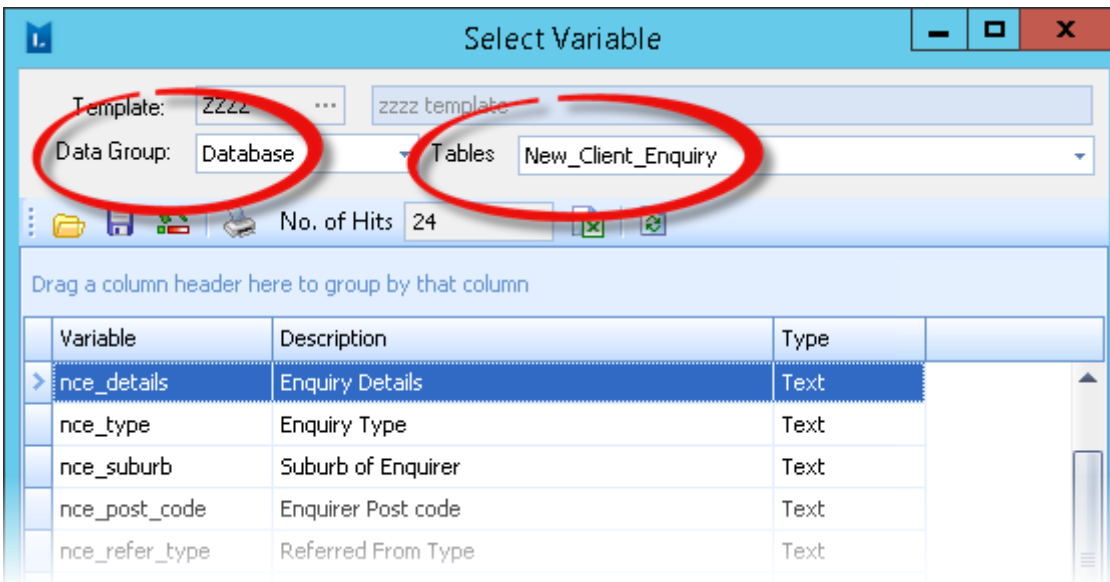
Can I create the Client and the Matter from one Reverse Merge PDF form?

Yes. If your form has any matter fields mapped, a matter will be created. If it also has any Client, Matter Contact, Billing Entity, Account To or Matter Parties, then those Entities will be added to their respective places in the matter after being created as Entities in the system.

Reverse Merge new New Client Enquiries

If you haven't already tried mapping to [Matter Attributes](#), it is best to get the hang of that first.

Mapping NCE fields is similar to [mapping Matter Attributes](#) except that you will be putting a NCE related variable from the Database Data Group in the LawMaster Variable field on the Add Document Template Variable window.

Variable	Description	Type
> nce_details	Enquiry Details	Text
nce_type	Enquiry Type	Text
nce_suburb	Suburb of Enquirer	Text
nce_post_code	Enquirer Post code	Text
nce_refer_type	Referred From Type	Text

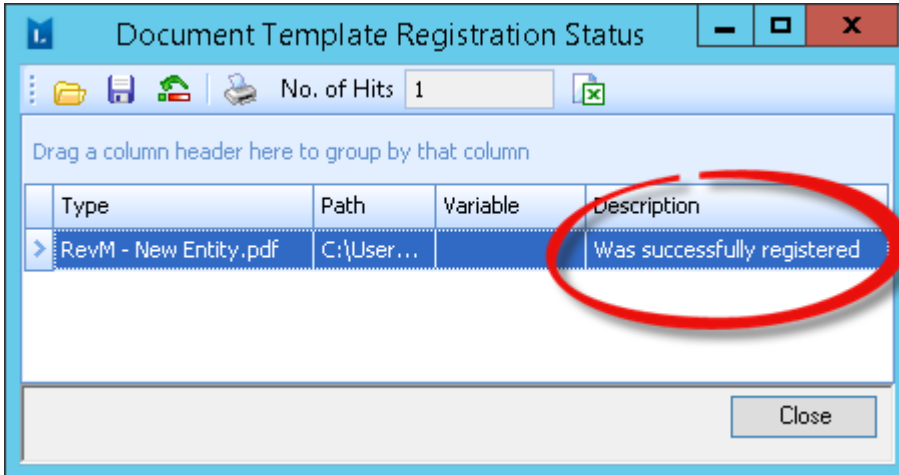
How many of the NCE fields in LawMaster do I need to have on my form?

You can map as many or as few of the available NCE related fields as you like because when the form is Reverse Merged, the standard New Client Details screen that users would see if they added an Enquiry from the Main Menu or New Client Enquiry screen is triggered. The difference is that whatever data has been mapped and exists in the PDF form (ie, your client might not fill out every field) will be pre-filled on the New Client Details screen.

Step 5 - When you have finished mapping

Click OK on the Modify Document Template window and then re-register your template, just like you would if you had just added some new variables to a Word based template.

This time, you should get the message that the Template was successfully registered. You *should not* get the message that there were *no variables in the document*.



Your Reverse Merge PDF template is now ready to use. You can test merge it from the Document Templates screen or merge it from a matter.

You do not need to merge the template for every use. For example, you can merge it once and upload to your website for clients to download and fill.

That said, you can export data such as the client name and address to a form before sending it to them to complete. In this case you would merge a new form for each client.

Tips

Combine fields in the mapping and/or add extra text

Import only mappings may combine more than one field from the PDF and/or some text into just one LawMaster Attribute or Database Data Group variable.

For example – (FieldName) some text and (AnotherField) might result in the value “Text from field name some text and Text from another field” being stored in a Matter Attribute after a Reverse Merge.

Export only mappings may combine more than one LawMaster variable or Matter Attribute, and/or some text, into just one PDF field.

For example – [CL1Name] who resides at [CLAddr1Line] might result in the value “John Smith who resides at 12 May Street, Brisbane QLD 4000” being sent to a PDF form field after a regular outbound type merge.

The following screenshot has an example of each.

Drag a column header here to group by that column

Form Fields	Variable	Import	Export	Descr
(CombinationField)	[CL1Name] who resides at [CLAddr1Line]	N	Y	
(DateLodged)	[dr_date_rec]	Y	N	
(DeedRef)	[dr_reference]	Y	N	
(DocDate)	[dr_doc_date]	Y	N	
(DocDetails) This document is dated (DocDate)	[dr_details]	Y	N	
(ExpiryDate)	[dr_exp_date]	Y	N	
(MatterNo)	[dr_matter]	Y	N	

Pre-Merge Task | Document Variables | **Mapped Variables** | Entities

Last Updated: 17/03/2016 12:49:39 AM By: ATB

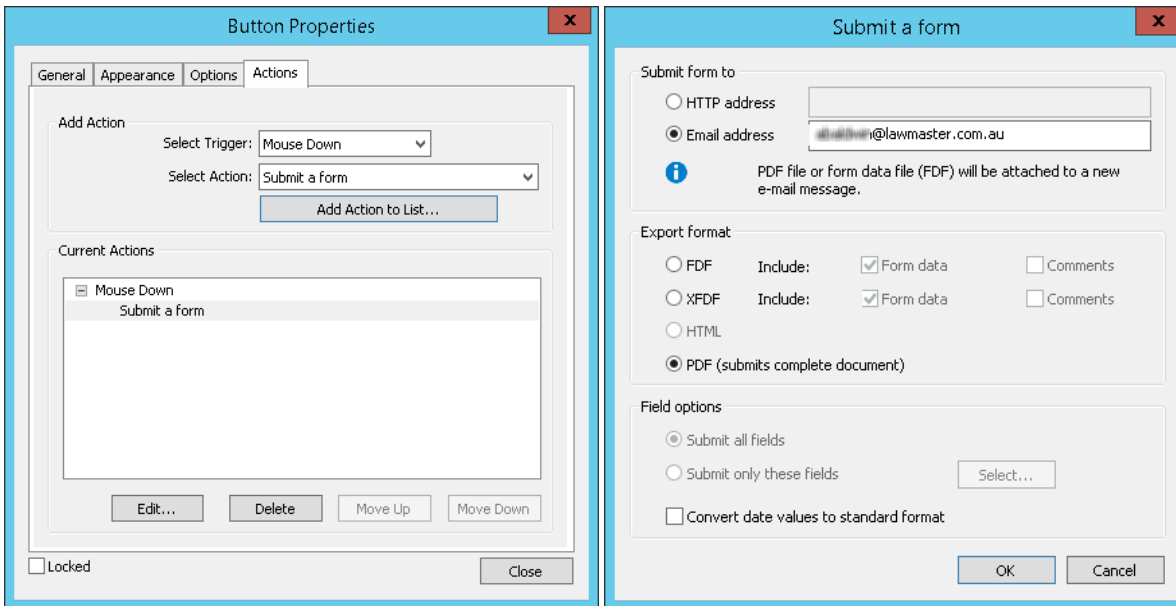
OK Cancel

Put a button in your PDF to have it emailed back to you once filled

This is purely PDF technology, not LawMaster, and as such is provided here as a courtesy only.

Mostly, you will be using Text Fields in your PDF. After all, you are collecting data however, there are many other things that PDF forms can do also.

Instead of a Text Field, try adding a Button. Buttons can have actions. The following settings are for a button that will email the form back to me. It is worth noting that this is probably only useful for internal or corporate use because it uses the installed email application, e.g. Outlook, and does not cater for web mail.



Using a Reverse Merge PDF form

Merging the form for filling

This must be done at least once.

To Merge your PDF Form out of LawMaster, go to the Templates tab on the Lawyers Workbench in a matter and merge it just like you would any regular Word Templates. You will need to do this at least once to get a PDF Form for people to fill in for Reverse Merge purposes. You can email this form to clients or others, have it available on your website or intranet, or just make it available at a terminal or iPad in your office.

Alternatively, you can export data such as the client name and address to a form before sending it to someone to complete. In this case you would probably merge a new form for each client.

Filling the form and getting it back

Your clients or other entities from whom you are wanting to get information now fill the form you have created and sent to them.

Most people have Adobe Acrobat Reader installed and this will allow your end users to fill and save the form. Other reputable applications like Nitro and Foxit will also present no difficulty. Also tested is the Google Chrome default viewer.

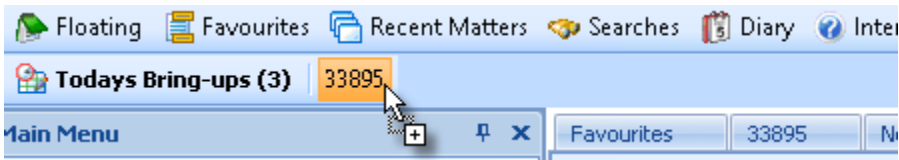
[A Reverse Merge template I have been using for a while suddenly doesn't work](#)

Once filled, the form will need to be sent back to your firm to be dragged and dropped into LawMaster. Usually this is done via email.

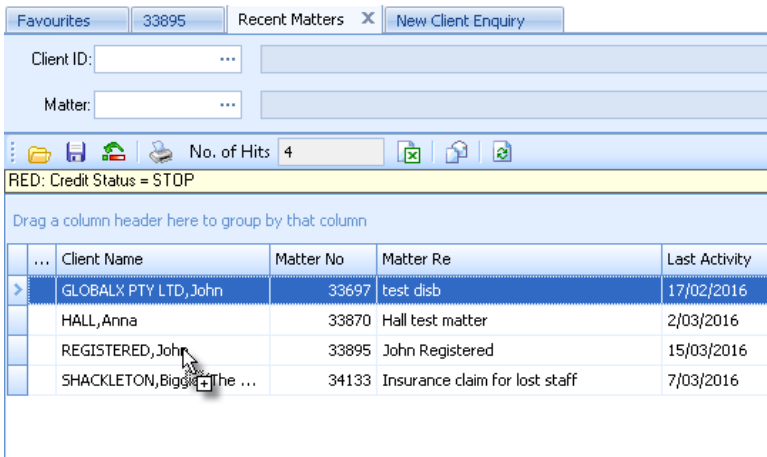
Reverse Merge – bring the form and its data into LawMaster

Drag and drop Reverse Merge – locations

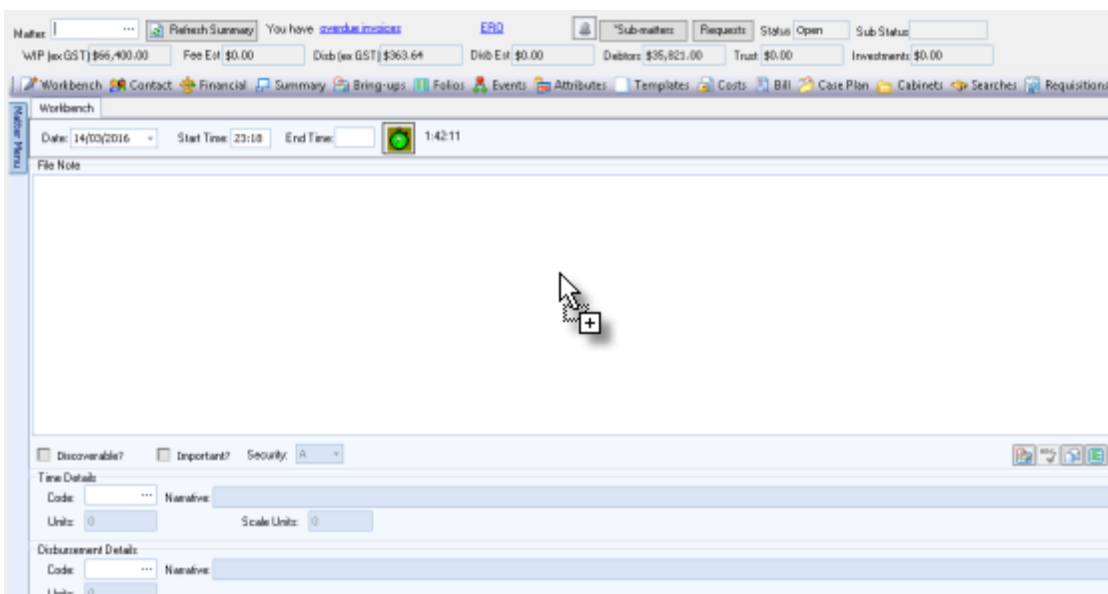
To an open Matter on the Open Matters Toolbar



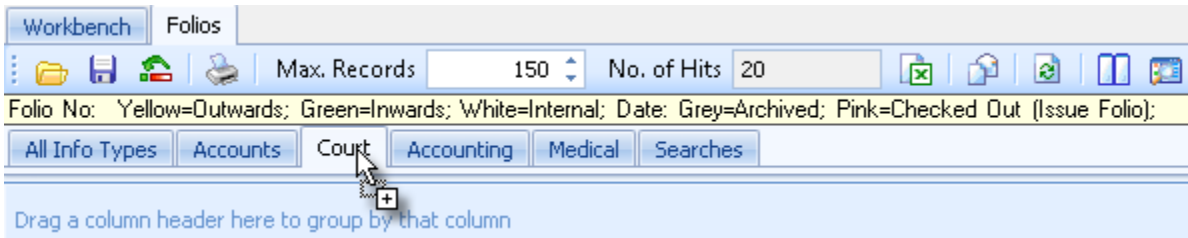
To a Matter in the Recent Matters list



Anywhere on an open Matter



If the Folios tab is open in the Matter, it is also possible to drop onto a specific Information Type



To an Enquiry in Query New Client Enquiries

To an Entity in Entity Search

To an Entity in My Contacts

Floating File Note Reverse Merge

Select Other from the Floating File Note.

Workflow Statement Reverse Merge

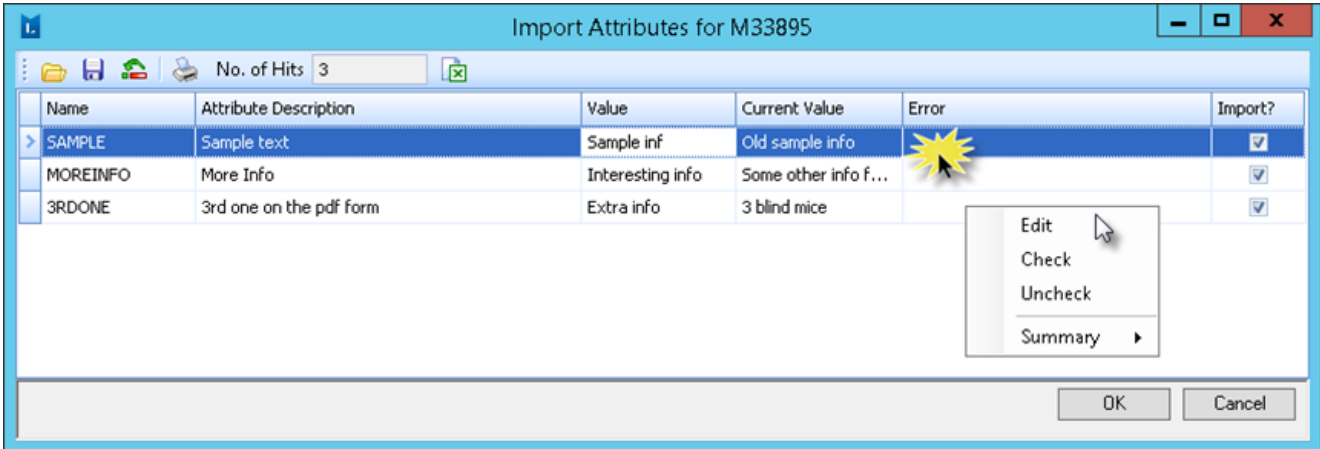
Use ADD-DOCUMENT() in conjunction with GET-DOCUMENT(). The LawMaster Template name must be specified.


Format – ADD-DOCUMENT(<file-name>, <precis>, <template-name>, <ToFrom>)

Example – Add-DOCUMENT(GET-DOCUMENT(), "Details from Client", "ReverseMerge.pdf", "Imported from file system")

Reverse Merge action

Matter Attributes



Name	Attribute Description	Value	Current Value	Error	Import?
SAMPLE	Sample text	Sample inf	Old sample info		<input checked="" type="checkbox"/>
MOREINFO	More Info	Interesting info	Some other info f...		<input checked="" type="checkbox"/>
3RDONE	3rd one on the pdf form	Extra info	3 blind mice		<input checked="" type="checkbox"/>

Name – the field name from the PDF form

Attribute Description – the LawMaster Matter Attribute description

Value – the data from the form

Current Value – the data currently on the Matter

Error – message if any, eg, [data type mismatches](#)

Import – checkbox used by the LawMaster user to control whether the new data replaces the old data or not

Lines in the grid can be multi-selected with Shift clicks or Ctrl clicks and the context menu functions (shown in the screenshot above) used in bulk.

Following the data import, the user will be asked to confirm the import of the PDF itself to the DMS.

Other Types – New Entities, Matters, New Client Enquiries

Entities – the Add Entity Details screen is triggered and prefills with the data from the form

Matters – the Add Matter Details screen is triggered and prefills with the data from the form

Both Entities and Matters – after adding the Entities as above, the Matter is added as above with the addition of pre-filled Entity ID's where relevant

New Client Enquiries – the New Client Details screen is triggered and prefills with the data from the form

Following the data import, the user will be asked to confirm the import of the PDF itself to the DMS.