



Merge Variables Guide

Applies to: Amicus Attorney

Assemble documents based on Document Merge Templates, using information from your Amicus database. And generate e-mail messages based on E-mail Merge Templates.

Overview	2
People Basic Information	3
People Addresses	5
People Communications	7
People Custom Information	9
File Basic Information.....	10
File Extended Information	12
File Custom Information	14
People on the File – Custom Information	15
All Custom Information	15
People on the File – Basics	16
People on the File – Communications	18
People on the File – Addresses	19
HotDocs People on the File	20
HotDocs People on the File – Communications	22
HotDocs People on the File – Addresses	23
Firm Information	24

Overview

Amicus Attorney provides a Document Assembly feature that enables you to assemble documents, based on Document Merge Templates, utilizing information from your Amicus database. In addition, Amicus Attorney provides an E-mail Merge feature that enables you to generate e-mail messages based on E-mail Merge Templates.

Each Amicus Merge Template references a word processor template that generally contains both unchanging text and Merge Variables. These Variables are placeholders for the text that is automatically supplied from various Amicus records such as Files, People, Calendar, and Time Entry when you assemble a particular document or e-mail. Amicus Attorney comes with several Merge Templates for a variety of purposes—you can use them as they are, edit them, or create your own Templates.

For former users of Amicus Small Firm, V+, and earlier, the Merge Variables in templates that were created in those versions will be automatically mapped to Amicus Attorney Merge Variables when documents/e-mail are assembled.

This Guide lists the Amicus Attorney fields, the Amicus Attorney Merge Variables, the lower version Merge Variables and Corel® WordPerfect® Numbers (*WP #*), the format of the text output by the variable and, where necessary, a brief description. A separate table is provided for each of the Amicus Attorney field Categories.

For more information about Document Assembly and E-Mail Merge, see the “Document Assembly” topic in the online User Help.

Merged Format

The format in which data from Amicus Attorney fields is merged into assembled documents/e-mail is specified in the *Merged Format* column. Data is merged into WordPerfect and Microsoft® Word documents or Word-based e-mail as text. In HotDocs, however, the merged data keeps its type, as specified. The following types of data are used:

- **Text**—unformatted text, except where a particular format is specified in the Description column
- **Date**—date in the Short Date Format specified in the Display Preferences of the Person assembling the document/e-mail
- **Boolean**—“True” or “False”
- **Numeric**—number (including currency and percent), used only for Custom Fields merged to HotDocs
- **Name**—full name, formatted as follows if the Person is an Individual:
 <Prefix> <SPACE> <First Name> <SPACE> <Middle Name> <SPACE> <Last Name> <COMMA><SPACE> <Suffix>
or formatted as follows if the Person is a Company:
 <Company Name>
- **Address**—formatted as follows:
 <Company Name>
 <Street>
 <City> <SPACE> <State/Province><SPACE> <ZIP/Postal Code>

People Basic Information

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
Full Name	People_Full_Name	ContactName	1	Name	
First Name	People_First_Name	ContactFirstName	2	Text	
Middle Name	People_Middle_Name	ContactMiddleName	3	Text	
Last Name	People_Last_Name	ContactSurname	4	Text	
Saluation	People_Saluation	ContactSaluation	5	Text	
Prefix	People_Prefix	ContactPrefix	6	Text	E.g., "Mr.", "Ms.", "Dr."
Suffix	People_Suffix			Text	E.g., "Jr.", "Sr.", "Esq."
Position	People_Position	ContactTitle	12	Text	
Company Name	People_Company_Name	ContactCompanyName	7	Text	
Primary Address	People_Primary_Address	ContactAddress	8	Address	
Primary Street	People_Primary_Street	ContactStreet	13	Text	
Primary City	People_Primary_City	ContactCity	14	Text	
Primary State/Province	People_Primary_State	ContactState	15	Text	
Primary Country	People_Primary_Country	ContactCountry	16	Text	
Primary ZIP/Postal Code	People_Primary_ZIP	ContactZip	17	Text	
Primary Phone	People_Primary_Phone	ContactPhoneNo	9	Text	
Primary Fax	People_Primary_Fax	ContactFaxNo	10	Text	
Primary Web Address	People_Primary_Web			Text	
Primary E-mail	People_Primary_Email	ContactEmail	225	Text	
Main Note	People_Main_Note			Text	
All Notes	People_Notes	ContactNotes	18	Text	All Notes associated with the Person (not including the Main Note), in the format: <Note Text> <Author's Initials> <Date>

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
My Notes	People_My_Notes			Text	All of your Notes associated with the Person (not including the Main Note), in the format: <Note Text> <Author's Initials> <Date>
Date Last Contacted	People_Last_Contacted	ContactLastContacted	19	Date	Date the Person was last contacted by you
Person is Marked	People_Is_Marked	ContactIsMarked	20	Boolean	Person is Marked in the People Index list
Role on File	People_File_Role	ContactRole	21	Text	Role on the File ("Lawyer", "Party", "Client", etc.)
Role on File Attributes	People_File_Role_Attribs	ContactAttribs	22	Text	If the Person's Role on the File is "Lawyer", this is the name of the Person they are representing. If their Role is "Party" and they are represented by a lawyer, this is the name of that lawyer. Otherwise, this is the text stored in the associated text box.
Is a Company	People_Is_Company	ContactIsCorp	23	Boolean	Whether the Person is a Company rather than an Individual
Is a Company on the File	People_File_Is_Company			Boolean	Person is designated a Company on a File
Groups	People_Groups	ContactGroups	155	Text	All People Groups the Person belongs to
Assigned Firm Members	FM_To_People	ContactAttorneys	156	Name	Full Names of all Firm Members assigned to the Person

People Addresses

People Address Merge Variables are dynamically provided at the time a template is created or edited, based on the Address Labels defined by your Amicus Administrator.

These Merge Variable names include the Address Labels and Address Types (Street, City, State, Country, or ZIP). Any spaces are replaced by underscores. For example, to provide information from the *Business Street* Address Field, you would insert the *People_Business_Street* Merge Variable.



NOTE: A Person's Primary Address is included in the People Basic Information category.

For your convenience, the Merge Variables for the default Amicus Attorney 2008 or later Address Labels are detailed in the following table, below the first row. You may have more Address Merge Variables than are listed here, based on additional Labels defined by your Amicus Administrator.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format
		Merge Variable	WP #	
<Address Label> <Address Type>	People_<Address_Label>_ <Address_Type>	(See below)		Text
Business Address	People_Business_Address			Address
Business Street	People_Business_Street	ContactBusinessStreet	202	Text
Business City	People_Business_City	ContactBusinessCity	203	Text
Business State/Province	People_Business_State	ContactBusinessState	204	Text
Business Country	People_Business_Country	ContactBusinessCountry	205	Text
Business ZIP/Postal Code	People_Business_ZIP	ContactBusinessZip	206	Text
Home Address	People_Home_Address			Address
Home Street	People_Home_Street	ContactHomeStreet	210	Text
Home City	People_Home_City	ContactHomeCity	211	Text
Home State/Province	People_Home_State	ContactHomeState	212	Text
Home Country	People_Home_Country	ContactHomeCountry	213	Text

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format
		Merge Variable	WP #	
Home ZIP/Postal Code	People_Home_ZIP	ContactHomeZip	214	Text
Other Address	People_Other_Address			Address
Other Street	People_Other_Street	ContactOtherStreet	218	Text
Other City	People_Other_City	ContactOtherCity	219	Text
Other State/Province	People_Other_State	ContactOtherState	220	Text
Other Country	People_Other_Country	ContactOtherCountry	221	Text
Other ZIP/Postal Code	People_Other_ZIP	ContactOtherZip	222	Text

People Communications

People Communications Merge Variables are dynamically provided at the time a template is created or edited, based on the Communications Labels defined by your Amicus Administrator.

These Merge Variable names include the Communications Labels and Communications Types (Phone, Fax, Email, Web). Any spaces are replaced by underscores. For example, to provide information from the *Business Phone* Address Field, you would insert the *People_Business_Phone* Merge Variable.



NOTE: A Person's Primary Phone, Fax, E-mail, and Web Address are included in the People Basic Information category.

For your convenience, the Merge Variables for the default Amicus Attorney 2008 or later Communications Labels are detailed in the following table, below the first row. You may have more Communications Merge Variables than are listed here, based on additional Labels defined by your Amicus Administrator.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format
		Merge Variable	WP #	
<Communications Label> <Communications Type>	People_<Communications_Label>_ <Communications_Type>	(See below)		Text
Business Phone	People_Business_Phone	ContactBusinessPhone	190	Text
Business 2 Phone	People_Business_2_Phone	ContactBusiness2Phone	191	Text
Home Phone	People_Home_Phone	ContactHomePhone	192	Text
Home 2 Phone	People_Home_2_Phone	ContactHome2Phone	193	Text
Assistant's Phone	People_Assistant_Phone	ContactAssistantPhone	195	Text
Cell Phone	People_Cell_Phone	ContactCellularPhone	196	Text
Other Phone	People_Other_Phone	ContactOtherPhone	194	Text
Car Phone	People_Car_Phone	ContactCarPhone	197	Text
Pager Phone	People_Pager_Phone	ContactPagerPhone	198	Text
ISDN Phone	People_ISDN_Phone	ContactISDNPhone	199	Text
Mobile Phone	People_Mobile_Phone	ContactMobilePhone	200	Text

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format
		Merge Variable	WP #	
Cottage Phone	People_Cottage_Phone	ContactCottagePhone	201	Text
Business Fax	People_Business_Fax	ContactBusinessFaxNo	208	Text
Home Fax	People_Home_Fax	ContactHomeFaxNo	216	Text
Other Fax	People_Other_Fax	ContactOtherFaxNo	224	Text
Business Web Address	People_Business_Web	ContactBusinessWebPage	209	Text
Home Web Address	People_Home_Web	ContactHomeWebPage	217	Text
Other Web Address	People_Other_Web			Text
Business E-mail	People_Business_Email	ContactBusinessEmail	207	Text
Home E-mail	People_Home_Email	ContactHomeEmail	215	Text
Other E-mai	People_Other_Email	ContactOtherEmail	223	Text

People Custom Information

Custom Field Merge Variables are dynamically provided at the time a template is created or edited, based on the Custom Fields defined by your Amicus Administrator. Only those Custom Fields defined for use on [Custom Pages](#) can generate data for assembled documents/e-mail.

The Merge Variable names include the Custom Field Names. For example, to provide information from the *People Custom Date Of Birth* Custom Field, you would insert the *PCST_Date_Of_Birth* Merge Variable, where “PCST” stands for People Custom.



NOTE: The Amicus Attorney lower version Merge Variable names were:

- ContactCustomField1 to ContactCustomField3—with WordPerfect Numbers 24 to 26, respectively
- ContactCustomField4 to ContactCustomField20—with WordPerfect Numbers 276 to 292, respectively

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format
		Merge Variable	WP #	
People Custom <Custom Field Label>	PCST_<Custom_Field_Name>	ContactCustomField<1-3, 4-20>	<24-26, 276-292>	Text, Date, Numeric, or Boolean



TIP: If you wish to generate documents/e-mail that include Custom Fields, ensure that those Field Names do not contain dashes or other special characters. Word and WordPerfect merge work only with names composed of letters, numbers, or underscore characters. We recommend using short names (e.g. 34 characters or less).

File Basic Information

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
Short File Name	File_Short_File_Name	FileShortFileName	27	Text	
Date Opened	File_Date_Opened	FileDateOpened	28	Date	
Date Closed	File_Date_Closed	FileDateClosed	29	Date	
File Type	File_Type	FileType	30	Text	
Full Client Name	File_Full_Client_Name	FileClientName	31	Text	
Full Matter Name	File_Full_Matter_Name	FileMatterName	32	Text	
Summary	File_Summary	FileSummary	33	Text	
Main Note	File_Main_Note			Text	
All Notes	File_Notes	FileGeneralNotes	52	Text	All Notes associated with the File (not including the Main Note), in the format: <Note Text> <Author's Initials> <Date>
My Notes	File_My_Notes			Text	All of your Notes associated with the File (not including the Main Note), in the format: <Note Text> <Author's Initials> <Date>
Status Report	File_Status_Report	FileStatusReport	34	Text	
Client ID	File_Client_ID	FileClientID	35	Text	
Matter ID	File_Matter_ID	FileMatterID	36	Text	
Number of People	File_Num_Of_People	FileNumOfPeople	37	Text	Total number of Contacts on the File
Number of Lawyers	File_Num_Of_Lawyers	FileNumOfLawyers	39	Text	Number of Contacts on the File whose Role is "Lawyer"
Number of Parties	File_Num_Of_Parties	FileNumOfParties	40	Text	Number of Contacts on the File whose Role is "Party"
Number of Clients	File_Num_Of_Clients	FileNumOfClients	38	Text	Number of Contacts on the File whose Role is "Client"
Billing Category	File_Billing_Category	FileBillingCategory	41	Text	
Billing Rate	File_Billing_Rate	FileBillingRate	42	Text	File's Billing Rate
Is Task-Based Billing	File_Is_TBB			Boolean	File is set to use Task-based billing

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
Other	File_Admin_Other	FileAdminOther	46	Text	Contents of the Other field in the Admin > General view of the File
Source	File_Source	FileSource	43	Text	Matter Came To Us Because...
Referred by	File_Referral	FileReferral	44	Text	Name of the person who referred the case to us
Client's Business Type	File_Client_Business_Type	FileClientBusType	45	Text	
File is Special	File_Is_Special	FileIsSpecial	47	Boolean	
Special Status	File_Special_Status			Text	
File is Active	File_Is_Active	FileIsActive	48	Boolean	
File is Closed	File_Is_Closed	FileIsClosed	49	Boolean	
File is Open	File_Is_Open			Boolean	
Assigned Firm Members	Firm_Members_On_File	FileAttorneys	50	Name	Full Names of all Firm Members assigned to the File
Vacation Notes	File_Vacation_Notes	FileVacationNotes	51	Text	Note about what to do if something comes up while the Responsible Lawyer is away
Responsible Lawyer	File_Responsible_Lawyer	FileResponsibleLawyer	293	Name	Full Name of the Firm Member assigned as the Responsible Lawyer on the File
People on File Names	File_People_Names_List			Name	Comma-separated list of the Contacts on the File
People on File Mail List	File_People_Mailing_List			Name, Text, Address	Formatted list of the Contacts on the File, in the format: <Full Name> <Position> <Primary Address> <BLANK LINE>

File Extended Information

Some types of File information can be quite large, such as All To Do's on a File. It slows down the document/e-mail assembly process when it is collected and passed on to the document/e-mail. To help speed things up, only the extended information specifically requested is passed to documents/e-mail.

If you want to include any of the following when a document/e-mail is assembled, you must select the corresponding checkboxes in the Extended Fields > Fields on Files view of the Standard Template Details dialog. For more information, see the "Document/E-mail Assembly" topic of the online User Help.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
All Appointments*	File_Appointments	FileAppointments	53	Text	
All To Do's*	File_To_Dos	FileToDos	54	Text	
All Milestones*	File_Milestones			Text	
All Done To Do's*	File_Done_To_Dos	FileDoneToDos	55	Text	
All Time Entries*	File_Time_Entries	FileTimeEntries	56	Text	
All Phone Calls and Messages*	File_Verbal_Communication	FilePhoneLogs	57	Text	
All Written Communications*	File_Written_Communication			Text	All E-mail, Faxes, and Letters on the File
All Documents*	File_Documents	FileDocuments	58	Text	
Full Chronology*	File_Combined_Chronology	FileChronoCombine	59	Text	All Appointments, To Do's, Done To Do's, Time Entries, Communications, Documents on the File, (and Notes, if shown in Amicus Attorney 2009 and higher), arranged chronologically
My Appointments*	File_My_Appointments	FileMyAppointments	60	Text	
My To Do's*	File_My_To_Dos	FileMyToDos	61	Text	
My Milestones*	File_My_Milestones			Text	
My Done To Do's*	File_My_Done_To_Dos	FileMyDoneToDos	62	Text	
My Time Entries*	File_My_Time_Entries	FileMyTimeEntries	63	Text	

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
My Phone Calls and Messages*	File_My_Verbal_Communication	FileMyPhoneLogs	64	Text	
My Written Communications*	File_My_Written_Communication			Text	Your E-mail, Faxes, and Letters on the File
My Documents*	File_My_Documents			Text	
My Chronology*	File_My_Combined_Chronology	FileMyChronoCombine	65	Text	Your Appointments, To Do's, Done To Do's, Time Entries, Communications, Documents on the File, (and Notes, if shown in Amicus Attorney 2009 and higher), arranged chronologically
All Total Time*	File_Total_Time	FileTotalTime	66	Text	Total time spent on the File, according to Time Entries
Value of All Total Time*	File_Total_Time_Value	FileTotalTimeValue	67	Text	Monetary value of the total time spent on the File
My Total Time*	File_My_Total_Time	FileMyTotalTime	68	Text	Your time spent on the File, according to Time Entries
Value of My Total Time*	File_My_Total_Time_Value	FileMyTotalTimeValue	69	Text	Monetary value of your time spent on the File
Last/Next Report*	File_Last_Next_Report	FileLastNextReport	70	Text	Any Firm Member's last Event (most recent past Appointment or Done To Do) on the File, last Time Entry saved on the File, and next Event on the File
My Last/Next Report*	File_My_Last_Next_Report	FileMyLastNextReport	71	Text	Your last Event (most recent past Appointment or Done To Do) on the File, last Time Entry saved on the File, and next Event on the File

File Custom Information

Custom Field Merge Variables are dynamically provided at the time a template is created or edited, based on the Custom Fields defined by your Amicus Administrator. Only those Custom Fields defined for use on Custom Pages can generate data for assembled documents/e-mail.

The Merge Variable names include the Custom Field Names. For example, to provide information from the *File Custom Date Of Birth* Custom Field, you would insert the *FCST_Date_Of_Birth* Merge Variable, where “FCST” stands for File Custom.



NOTE: The Amicus Attorney lower version Merge Variable names were:

- FileCustomField1 to CustomField50—with WordPerfect Numbers 226 to 275, respectively

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format
		Merge Variable	WP #	
File Custom <Custom Field Label>	FCST_<Custom_Field_Name>	FileCustomField<1-50>	<226-275>	Text, Date, Numeric, or Boolean



TIP: If you wish to generate documents/e-mail that include Amicus Custom Fields, ensure that those Field Names do not contain dashes or other special characters. Word and WordPerfect merge work only with names composed of letters, numbers, or underscore characters. We recommend using short names (e.g. 34 characters or less).



NOTE: Alternatively, in Version 2012 or later, you can output all the Custom Fields on a Custom Page or Record for one or more Files. This can be done from the Generate A Document function or from Advanced Reports. You do not need to create Merge Templates for this purpose, but it is necessary that SQL Reporting Services be installed and configured for the firm.

People on the File – Custom Information

Custom Field Merge Variables are dynamically provided at the time a template is created or edited, based on the Custom Fields defined by your Amicus Administrator. Only those Custom Fields defined for use on Custom Pages can generate data for assembled documents/e-mail.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format
		Merge Variable	WP #	
People Custom <Custom Field Label>	FPx_C_<Custom_Field_Name>	FileCustomField<1-50>		Text, Date, Numeric, or Boolean
People Custom <Custom Field Label>	FPx_C_<Custom_Field_Name>	FileCustomField<1-50>		Text, Date, Numeric, or Boolean

The Merge Variable names include the People on the File Custom Field Names. For example, to provide information from the *Contact Custom Field Date of Birth Field on the selected Contact on the File Custom Field*, you would insert the `FPx_C_Date_of_Birth` Merge Variable, where `FPx_C` stands for File People Custom field.



NOTE FOR HOTDOCS USERS: If HotDocs (MS Word, Wordperfect or Form) was selected from the pull-down menu in the Template Type field in the **Standard Template Details** dialog, you must check the custom fields you want to include in your template in the **Custom Fields – People to File** window.

All Custom Information

A combined list of People and File Custom Field Merge Variables is dynamically provided at the time a template is created or edited, based on the Custom Fields defined by your Amicus Administrator.

For more information see the “People Custom Information” and “File Custom Information” sections above.

People on the File – Basics

Information about particular People in a People On The File list can be added to an assembled document/e-mail via the Merge Variables in this category. For information about how and when such information is passed during document/e-mail assembly, see the “Document/E-mail Assembly” chapter of the *User Guide*.

When inserting these Merge Variables into Word and WordPerfect templates, you are prompted to replace the “X” in the Merge Variable by a number, indicating which of the selected People On The File should provide data for these particular Merge Variable. For example, *FilePeople4Surname* denotes the 4th selected Person from a People On The File list.



NOTE: For a list of the People On The File, use the *People On File Names* or *People On File Mail List* Merge Variable, described in the “File Basic Information” section above.

For the Variables used in HotDocs templates, please see the next section.

Amicus Attorney lower version and earlier Merge Variables and WordPerfect Field Numbers

The People on the File Merge Variables in lower versions of Amicus Attorney are enumerated in order to specify the applicable Person on the File—for example, *People1Salutation*, *People2Salutation*, *People3Salutation*, etc.

The WordPerfect Numbers for the *People1* Merge Variables are listed in the table below. To calculate the WP Numbers for subsequent People Merge Variables, simply add 12. For example, *People1Salutation*’s WP Number is 82, *People2Salutation*’s is 94, *People3Salutation*’s is 106, etc.

The only exception is for Middle Name. The WP Numbers for lower version People Middle Name Merge Variables can be determined as follows:

- *People1MiddleName* to *People5MiddleName*—the WordPerfect Numbers increase by 1, ranging from 294 to 298
- *People6MiddleName*—the WordPerfect Number is 345
- Successive occurrences of the Variable—the WordPerfect Numbers increase by 16—for example, the WordPerfect Number for *People7MiddleName* is 361

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
People Salutation	File_PeopleX_Salutation	People<1-N>Salutation	82	Text	

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
People Prefix	File_PeopleX_Prefix	People<1-N>Prefix	83	Text	E.g., "Mr.", "Ms.", "Dr."
People Suffix	File_PeopleX_Suffix			Text	E.g., "Jr.", "Sr.", "Esq."
People Position	File_PeopleX_Position	People<1-N>Title	84	Text	
People First Name	File_PeopleX_First_Name	People<1-N>FirstName	85	Text	
People Middle Name	File_PeopleX_Middle_Name	People<1-N>MiddleName	294	Text	
People Last Name	File_PeopleX_Last_Name	People<1-N>Surname	86	Text	
People Company Name	File_PeopleX_Company_Name	People<1-N>CompanyName	87	Text	
People Primary Address	File_PeopleX_Address	People<1-N>Address	88	Address	
People Primary City	File_PeopleX_City	People<1-N>City		Text	
People Primary Country	File_PeopleX_Country	People<1-N>Country		Text	
People Primary State	File_PeopleX_State	People<1-N>State		Text	
People Primary Street	File_PeopleX_Street	People<1-N>Street		Text	
People Primary ZIP	File_PeopleX_ZIP	People<1-N>ZIP		Text	
People Primary Phone	File_PeopleX_Phone_No	People<1-N>PhoneNo	89	Text	
People Primary Fax	File_PeopleX_Fax_No	People<1-N>FaxNo	90	Text	
People Primary Email	File_PeopleX_Email	People<1-N>Email		Text	
People Primary Web Address	File_PeopleX_Web_Address	People<1-N>Web_Address		Text	
People Role on File	File_PeopleX_Role	People<1-N>Role	91	Text	Role on the File ("Lawyer", "Party", "Client", etc.)
People Role Attributes	File_PeopleX_Attribs	People<1-N>Attribs	92	Name or Text	If the Person's Role on the File is "Lawyer", this is the name of the Person they are representing. If their Role is "Party" and they are represented by a lawyer, this is the name of that lawyer. Otherwise, this is the text stored in the associated text box.
People is a Company	File_PeopleX_Is_Company	People<1-N>IsCorp	93	Boolean	Person on the File is designated a Company

People on the File – Communications

To insert specific communication fields choose from the following variables.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
People Assistant Phone	File_PeopleX_Assistant_Phone	PeopleAssistantPhone		Text	
People Business 2 Phone	File_PeopleX_Business2_Phone	PeopleBusiness2Phone		Text	
People Business Email	File_PeopleX_Business_Email	PeopleBusinessEmail		Text	
People Business Fax	File_PeopleX_Business_Fax	PeopleBusinessFax		Text	
People Business Phone	File_PeopleX_Business_Phone	PeopleBusinessPhone		Text	
People Business Web	File_PeopleX_Business_Web	PeopleBusinessWeb		Text	
People Car Phone	File_PeopleX_Car_Phone	PeopleCarPhone		Text	
People Cell Phone	File_PeopleX_Cell_Phone	PeopleCellPhone		Text	
People Cottage Phone	File_PeopleX_Cottage_Phone	PeopleCottagePhone		Text	
People Home2 Phone	File_PeopleX_Home2_Phone	PeopleHome2Phone		Text	
People Home Email	File_PeopleX_Home_Email	PeopleHomeEmail		Text	
People Home Fax	File_PeopleX_Fax	PeopleHomeFax		Text	
People Home Phone	File_PeopleX_Home_Phone	PeopleHomePhone		Text	
People Home Web	File_PeopleX_Home_Web	PeoplePhoneWeb		Text	
People ISDN Phone	File_PeopleX_ISDN_Phone	PeopleISDNPhone		Text	
People Mobile Phone	File_PeopleX_Mobile_Phone	PeopleMobilePhone		Text	
People Other Email	File_PeopleX_Other_Email	PeopleOtherEmail		Text	
People Other Fax	File_PeopleX_Other_Fax	PeopleOtherFax		Text	
People Other Phone	File_PeopleX_Other_Phone	PeopleOtherPhone		Text	
People Other Web	File_PeopleX_Other_Web	PeopleOtherWeb		Text	
People Pager Phone	File_PeopleX_Pager_Phone	PeoplePagerPhone		Text	

People on the File – Addresses

To insert specific address fields choose from the following variables.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
People Business Address	File_PeopleX_Business_Address	PeopleBusinessAddress		Address	
People Business City	File_PeopleX_Business_City	PeopleBusinessCity		Text	
People Business Country	File_PeopleX_Business_Country	PeopleBusinessCountry		Text	
People Business State	File_PeopleX_Business_State	PeopleBusinessState		Text	
People Business Street	File_PeopleX_Business_Street	PeopleBusinessStreet		Text	
People Business ZIP	File_PeopleX_Business_ZIP	PeopleBusinessZIP		Text	
People Home Address	File_PeopleX_Home_Address	PeopleHomeAddress		Address	
People Home City	File_PeopleX_Home_City	PeopleHomeCity		Text	
People Home Country	File_PeopleX_Home_Country	PeopleHomeCountry		Text	
People Home State	File_PeopleX_Home_State	PeopleHomeState		Text	
People Home Street	File_PeopleX_Home_Street	PeopleHomeStreet		Text	
People Home ZIP	File_PeopleX_Home_ZIP	PeopleHomeZIP		Text	
People Other Address	File_PeopleX_Other_Address	PeopleOtherAddress		Address	
People Other City	File_PeopleX_Other_City	PeopleOtherCity		Text	
People Other Country	File_PeopleX_Other_Country	PeopleOtherCountry		Text	
People Other State	File_PeopleX_Other_State	PeopleOtherState		Text	
People Other Street	File_PeopleX_Other_Street	PeopleOtherStreet		Text	
People Other ZIP	File_PeopleX_Other_ZIP	PeopleOtherZIP		Text	

HotDocs People on the File

In HotDocs templates, you do not need to specify particular People on the File. The HotDocs Repeat feature can be used with these Variables.

Users upgrading from Amicus Attorney lower versions should note that special Merge Variables for the first four People On The File are no longer provided and, therefore, old templates that include those Variables will need to be edited. For more information, see the “Document/E-mail Assembly” topic of the online User Help.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
People Salutation	File_People_Salutation	PeopleSalutation		Text	
People Prefix	File_People_Prefix	PeoplePrefix		Text	E.g., “Mr.”, “Ms.”, “Dr.”
People Suffix	File_People_Suffix			Text	E.g., “Jr.”, “Sr.”, “Esq.”
People Position	File_People_Position	PeopleTitle		Text	
People First Name	File_People_First_Name	PeopleFirstName		Text	
People Middle Name	File_People_Middle_Name	PeopleMiddleName		Text	
People Last Name	File_People_Last_Name	PeopleSurname		Text	
People Company Name	File_People_Company_Name	PeopleCompanyName		Text	
People Primary Address	File_People_Primary_Address	PeoplePrimaryAddress		Address	
People Primary City	File_People_Primary_City	PeoplePrimaryCity		Text	
People Primary Country	File_People_Primary_Country	PeoplePrimaryCountry		Text	
People Primary State	File_People_Primary_State	PeoplePrimaryState		Text	
People Primary Street	File_People_Primary_Street	PeoplePrimaryState		Text	
People Primary ZIP	File_People_Primary_ZIP	PeoplePrimaryZIP		Text	
People Primary Phone	File_People_Phone_No	PeoplePhoneNo		Text	
People Primary Fax	File_People_Fax_No	PeopleFaxNo		Text	
People Primary Email	File_People_Primary_Email	PeoplePrimaryEmail		Text	
People Primary Web Address	File_People_Primary_Web_Address	PeoplePrimaryWebAddress		Text	
People Role on File	File_People_Role	PeopleRole		Text	Role on the File (“Lawyer”, “Party”, “Client”, etc.)

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
People Role Attributes	File_People_Attribs	PeopleAttribs		Name or Text	If the Person's Role on the File is "Lawyer", this is the name of the Person they are representing. If their Role is "Party" and they are represented by a lawyer, this is the name of that lawyer. Otherwise, this is the text stored in the associated text box.
People is a Company	File_People_Is_Corporation	PeopleIsCorp		Boolean	Person is designated a Company on a File

HotDocs People on the File – Communications

To insert specific communication fields choose from the following variables.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
People Assistant Phone	File_PeopleX_Assistant_Phone	PeopleAssistantPhone		Text	
People Business 2 Phone	File_PeopleX_Business2_Phone	PeopleBusiness2Phone		Text	
People Business Email	File_PeopleX_Business_Email	PeopleBusinessEmail		Text	
People Business Fax	File_PeopleX_Business_Fax	PeopleBusinessFax		Text	
People Business Phone	File_PeopleX_Business_Phone	PeopleBusinessPhone		Text	
People Business Web	File_PeopleX_Business_Web	PeopleBusinessWeb		Text	
People Car Phone	File_PeopleX_Car_Phone	PeopleCarPhone		Text	
People Cell Phone	File_PeopleX_Cell_Phone	PeopleCellPhone		Text	
People Cottage Phone	File_PeopleX_Cottage_Phone	PeopleCottagePhone		Text	
People Home2 Phone	File_PeopleX_Home2_Phone	PeopleHome2Phone		Text	
People Home Email	File_PeopleX_Home_Email	PeopleHomeEmail		Text	
People Home Fax	File_PeopleX_Fax	PeopleHomeFax		Text	
People Home Phone	File_PeopleX_Home_Phone	PeopleHomePhone		Text	
People Home Web	File_PeopleX_Home_Web	PeoplePhoneWeb		Text	
People ISDN Phone	File_PeopleX_ISDN_Phone	PeopleISDNPhone		Text	
People Mobile Phone	File_PeopleX_Mobile_Phone	PeopleMobilePhone		Text	
People Other Email	File_PeopleX_Other_Email	PeopleOtherEmail		Text	
People Other Fax	File_PeopleX_Other_Fax	PeopleOtherFax		Text	
People Other Phone	File_PeopleX_Other_Phone	PeopleOtherPhone		Text	
People Other Web	File_PeopleX_Other_Web	PeopleOtherWeb		Text	
People Pager Phone	File_PeopleX_Pager_Phone	PeoplePagerPhone		Text	

HotDocs People on the File – Addresses

To insert specific address fields choose from the following variables.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
People Business Address	File_PeopleX_Business_Address	PeopleBusinessAddress		Address	
People Business City	File_PeopleX_Business_City	PeopleBusinessCity		Text	
People Business Country	File_PeopleX_Business_Country	PeopleBusinessCountry		Text	
People Business State	File_PeopleX_Business_State	PeopleBusinessState		Text	
People Business Street	File_PeopleX_Business_Street	PeopleBusinessStreet		Text	
People Business ZIP	File_PeopleX_Business_ZIP	PeopleBusinessZIP		Text	
People Home Address	File_PeopleX_Home_Address	PeopleHomeAddress		Address	
People Home City	File_PeopleX_Home_City	PeopleHomeCity		Text	
People Home Country	File_PeopleX_Home_Country	PeopleHomeCountry		Text	
People Home State	File_PeopleX_Home_State	PeopleHomeState		Text	
People Home Street	File_PeopleX_Home_Street	PeopleHomeStreet		Text	
People Home ZIP	File_PeopleX_Home_ZIP	PeopleHomeZIP		Text	
People Other Address	File_PeopleX_Other_Address	PeopleOtherAddress		Address	
People Other City	File_PeopleX_Other_City	PeopleOtherCity		Text	
People Other Country	File_PeopleX_Other_Country	PeopleOtherCountry		Text	
People Other State	File_PeopleX_Other_State	PeopleOtherState		Text	
People Other Street	File_PeopleX_Other_Street	PeopleOtherStreet		Text	
People Other ZIP	File_PeopleX_Other_ZIP	PeopleOtherZIP		Text	

Firm Information

This Category includes current Firm Member information (for the Amicus Attorney Office from which the user assembles the document/e-mail), firm information, today's date, and the name of the person assembling the document/e-mail.



NOTE: Information about Firm Members can also be included via the Merge Variables in the People Basic Information, People Addresses, and People Communications Categories.

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
Firm Member Full Name	FM_Full_Name	LawyerName	144	Name	
Firm Member First Name	FM_First_Name	LawyerFirstName	145	Text	
Firm Member Middle Name	FM_Middle_Name	LawyerMiddleName	299	Text	
Firm Member Last Name	FM_Last_Name	LawyerLastName	146	Text	
Firm Member Initials	FM_Initials	LawyerInitials	300	Text	
Firm Member ID	FM_ID	LawyerID	148	Text	Firm Member's User ID
Firm Member Primary Address	FM_Primary_Address			Address	
Firm Member Primary Street	FM_Primary_Street			Text	
Firm Member Primary City	FM_Primary_City			Text	
Firm Member Primary State/Province	FM_Primary_State			Text	
Firm Member Primary Country	FM_Primary_Country			Text	
Firm Member Primary ZIP/Postal Code	FM_Primary_ZIP			Text	
Firm Member Primary Phone	FM_Primary_Phone	LawyerPhoneNumber	147	Text	

Amicus Attorney Field List Item	Merge Variable	Amicus Lower Versions		Merged Format	Description
		Merge Variable	WP #		
Firm Member Primary Fax	FM_Primary_Fax	LawyerFaxNo	301	Text	
Firm Member Primary E-mail	FM_Primary_Email	LawyerEmail	302	Text	
Firm Name	Firm_Name	FirmName	183	Text	
Firm Primary Address	Firm_Primary_Address	FirmAddress	184	Address	
Firm Primary Street	Firm_Primary_Street			Text	
Firm Primary City	Firm_Primary_City			Text	
Firm Primary State/Province	Firm_Primary_State			Text	
Firm Primary Country	Firm_Primary_Country			Text	
Firm Primary ZIP/Postal Code	Firm_Primary_ZIP			Text	
Firm Primary Phone	Firm_Primary_Phone	FirmPhoneNo	185	Text	
Firm Primary Fax	Firm_Primary_Fax	FirmFaxNo	186	Text	
Firm Primary E-mail	Firm_Primary_Email	FirmEmail	187	Text	
Firm Primary Web Address	Firm_Primary_Web	FirmWebPage	188	Text	
Today's Date	Today_Date	TodayDate	149	Date	Date that the document/e-mail is assembled
Writer's Name	Writer_Name	WriterName	150	Name	Full Name of the Firm Member assembling the document/e-mail. This is the same as the Firm Member Full Name field if the person assembles the document/e-mail from their own Amicus Attorney Office.



AbacusNext
Phone: 800-472-2289
416-977-6633
www.abacusnext.com
info@abacusnext.com

Copyright © 2022 AbacusNext. All rights reserved.

AMICUS and AMICUS ATTORNEY are registered trademarks of AbacusNext.

All other trademarks referenced are the property of their respective owner. AbacusNext disclaims any proprietary interest in trademarks other than its own.

September 2022