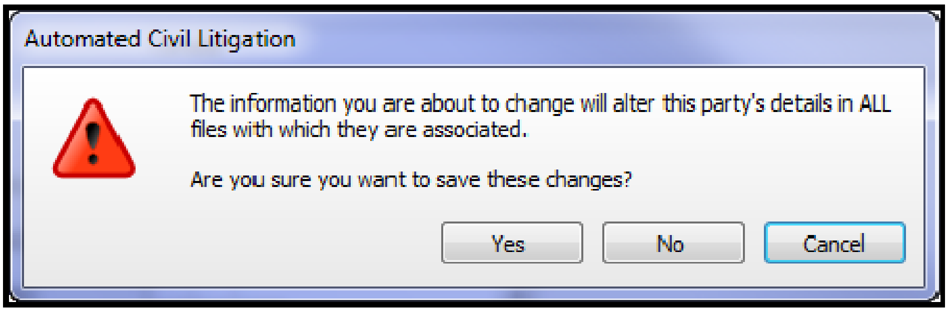
WARNING – WHEN UPDATING CONTACT DETAILS (AUGUST 2011)

One of the main benefits of the **Firm Address Book** is that once a party has been added, should an individual or corporation move or change telephone or fax numbers etc., only one person has to make the change and the change will carry over to ALL other files that party is linked to.

Changing the contact details

When edits are made to a stored client or contact, if that client/contact is linked to another file, the following **Warning** will appear. Clicking YES to this Warning, will make the same changes to ALL other files containing that party:



For example, if you change the contact details for your client, John Smith, the new information will carry over to **ALL** files that John Smith is connected to, not just your files for John Smith.

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The Payment Schedule calculates payments using compound interest. Interest is calculated on the day that each payment is made, and is compounded on to the total amount outstanding. The amount of interest due is based on the following formula:

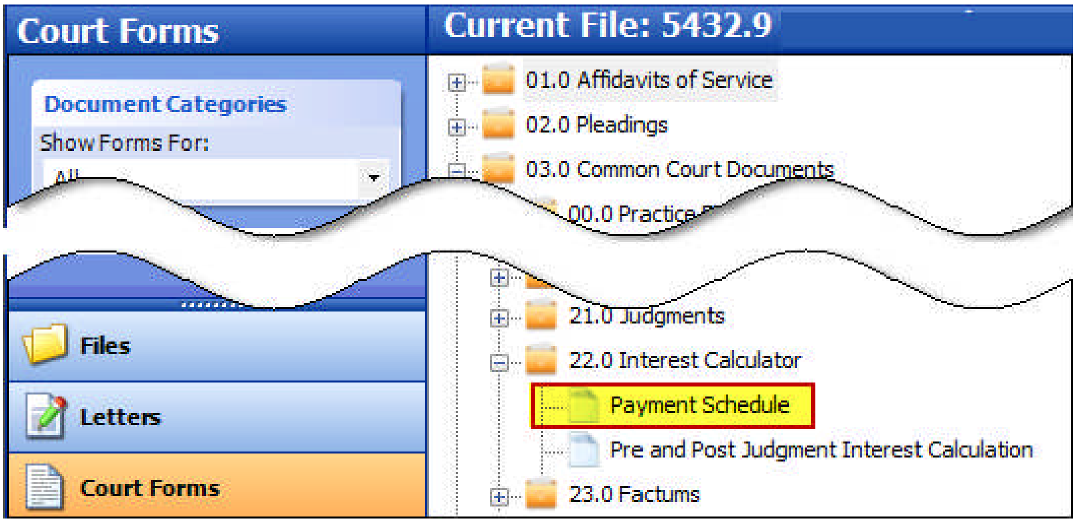
Amount Owing x ((# of days since last payment/365) x interest rate per annum)

The calculation can be done in one of two ways:

(a) Calculate amount of time to pay off debt using a specific amount paid either weekly, bi-weekly or monthly; or

(b) Calculate amount of each payment required to pay off debt in specific time period e.g. 1 year, 2 years, etc. Again, payments can be made weekly, bi-weekly or monthly.

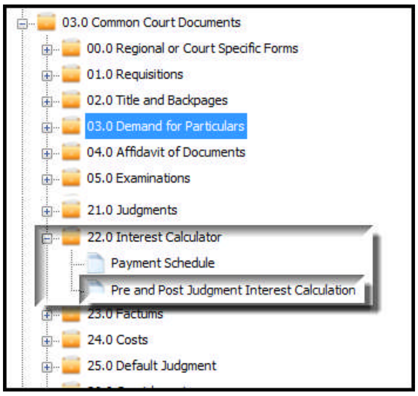
This form can be found under Court Forms → 03.0 Common Court Documents → 22.0 Interest Calculator → Payment Schedule.



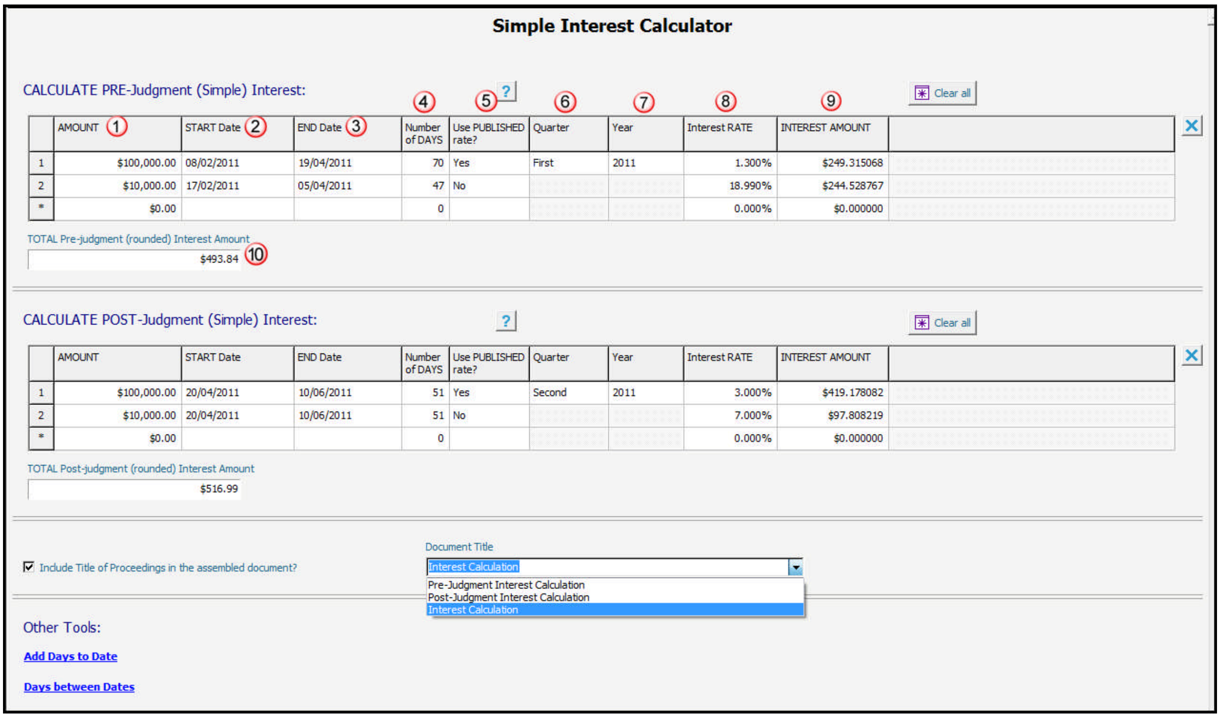
The **Interest Calculator** allows for both Pre and Post Judgment Interest Calculations.

Open Interest Calculator

1. Click **Court Forms** in the task pane. Search "Interest".
2. Double click on the **Pre and Post Judgment Interest Calculation** template.



In the **Simple Interest Calculator** dialog, complete the information as required for Pre-Judgment and/or Post-Judgment.



Simple Interest Calculator

CALCULATE PRE-Judgment (Simple) Interest: ? Clear all

	AMOUNT 1	START Date 2	END Date 3	Number of DAYS 4	Use PUBLISHED rate? 5	Quarter 6	Year 7	Interest RATE 8	INTEREST AMOUNT 9
1	$100,000.00	08/02/2011	19/04/2011	70	Yes	First	2011	1.300%	$249.315068
2	$10,000.00	17/02/2011	05/04/2011	47	No			18.990%	$244.528767
*	$0.00			0				0.000%	$0.000000

TOTAL Pre-judgment (rounded) Interest Amount
$493.84 10

CALCULATE POST-Judgment (Simple) Interest: ? Clear all

	AMOUNT	START Date	END Date	Number of DAYS	Use PUBLISHED rate?	Quarter	Year	Interest RATE	INTEREST AMOUNT
1	$100,000.00	20/04/2011	10/06/2011	51	Yes	Second	2011	3.000%	$419.178082
2	$10,000.00	20/04/2011	10/06/2011	51	No			7.000%	$97.808219
*	$0.00			0				0.000%	$0.000000

TOTAL Post-judgment (rounded) Interest Amount
$516.99

☑ Include Title of Proceedings in the assembled document?

Document Title
Interest Calculation
Pre-Judgment Interest Calculation
Post-Judgment Interest Calculation
Interest Calculation

Other Tools:

Add Days to Date

Days between Dates

1 Dollar amount

2 Interest Start Date

3 Interest End Date

4 Number of Days (auto-calculated)

5 Use Published rate – choose Yes for published rate or No for manual entry

6 Quarter

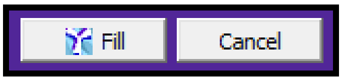
7 Year

8 Interest Rate – ACL will automatically populate this field if Yes is chosen for Published rate, otherwise manual completion is required.

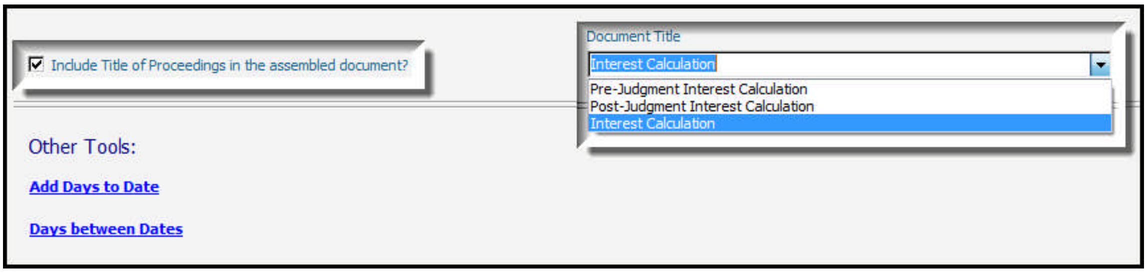
9 Interest Amount – ACL will automatically populate this field when all information in 1 to 8 is complete.

10 Total Interest Amount – ACL will automatically populate this field

To assemble the calculation into a Word document, click **Fill** at the bottom, right side.



Options are available for including the Title of Proceedings on the document as well as options for naming the document when assembled in Word.



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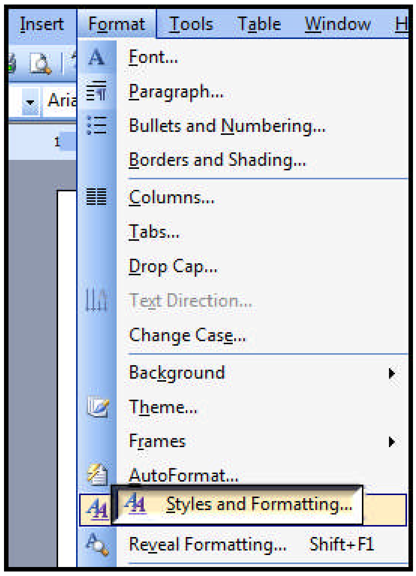
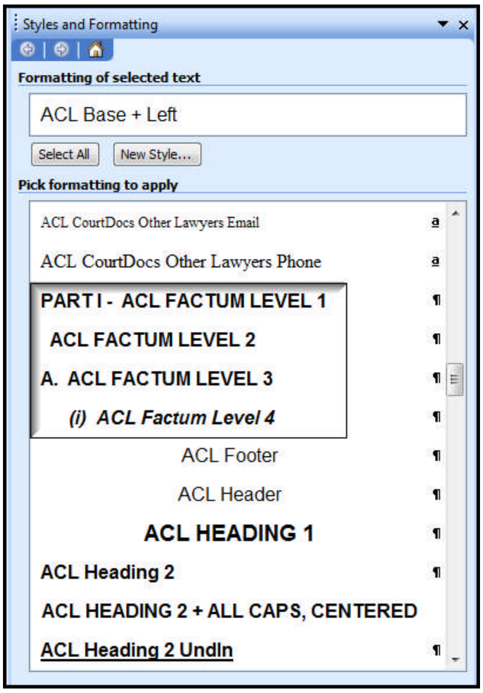
The Factum documents have four levels of Heading styles available for choosing.

To display a list of the available styles, from the Menu toolbar open the Styles and Formatting pane by clicking on **Format → Styles and Formatting**.



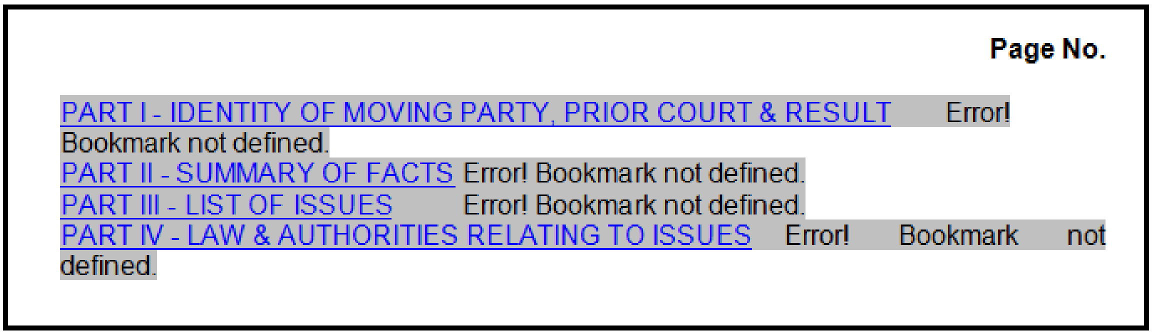


Scroll through the list of Styles to locate the ACL Factum styles.

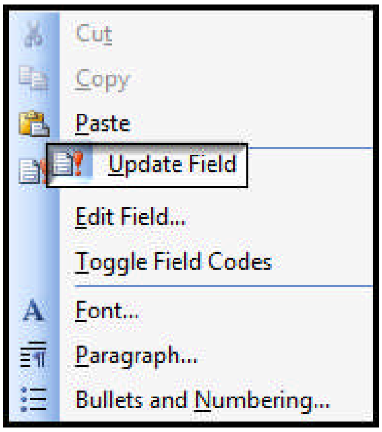
The available heading styles for the Factums are as highlighted.

Once the heading styles have been applied to the required headings or paragraphs, the Table of Contents can easily be created by following these steps:

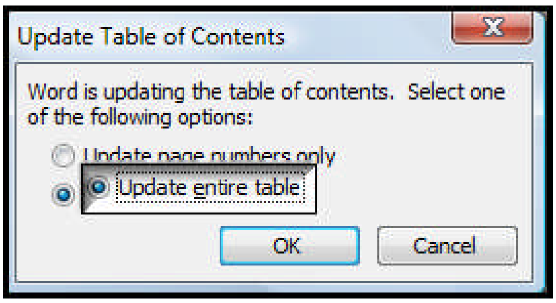
1. Right-click anywhere on the text inside the Table of Contents.


Page No.
PART I - IDENTITY OF MOVING PARTY, PRIOR COURT & RESULT Error! Bookmark not defined.
PART II - SUMMARY OF FACTS Error! Bookmark not defined.
PART III - LIST OF ISSUES Error! Bookmark not defined.
PART IV - LAW & AUTHORITIES RELATING TO ISSUES Error! Bookmark not defined.

2. From the menu, choose **Update Field**.



3. Select **Upgrade entire table** to build the Table of Contents.



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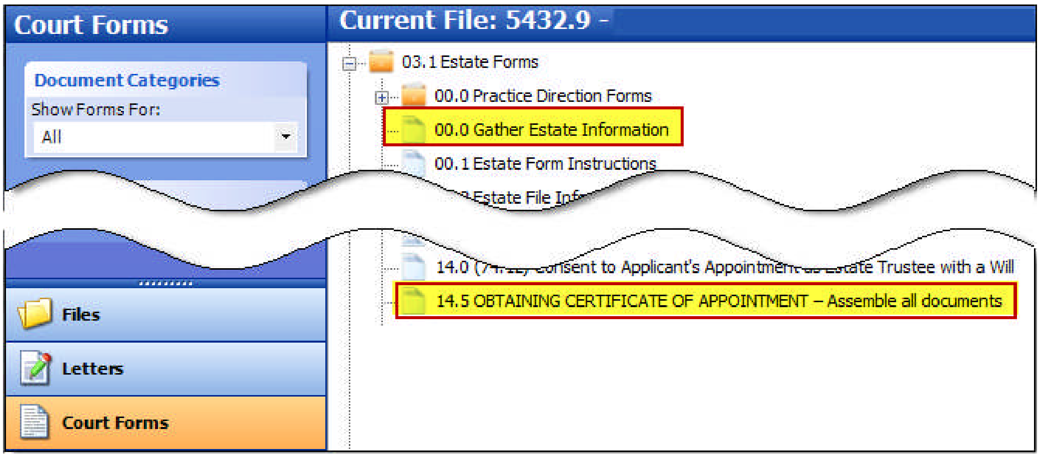
The Table of Contents will automatically generate based on the heading styles applied in the Factum. Note: The grey shading will not be visible when the document is printed.

TABLE OF CONTENTS

Page No.

Estate Administration Files can now assemble all documents necessary for **Obtaining a Certificate of Appointment** with one click.

This feature can be found under Court Forms →03.1 Estate Forms 14.5 OBTAINING CERTIFICATE OF APPOINTMENT – Assemble all documents



Select the appropriate options from the dialog:

Each of the listed documents will assemble consecutively. The various dialogs will appear as required for completion, in the order that the forms are listed. For example, the *Beneficiary Dialog* will appear twice – the first instance relates to the Affidavit of Service, the second instance relates to the Notice of an Application. When all documents have assembled, a note will appear that simply says **Done**.

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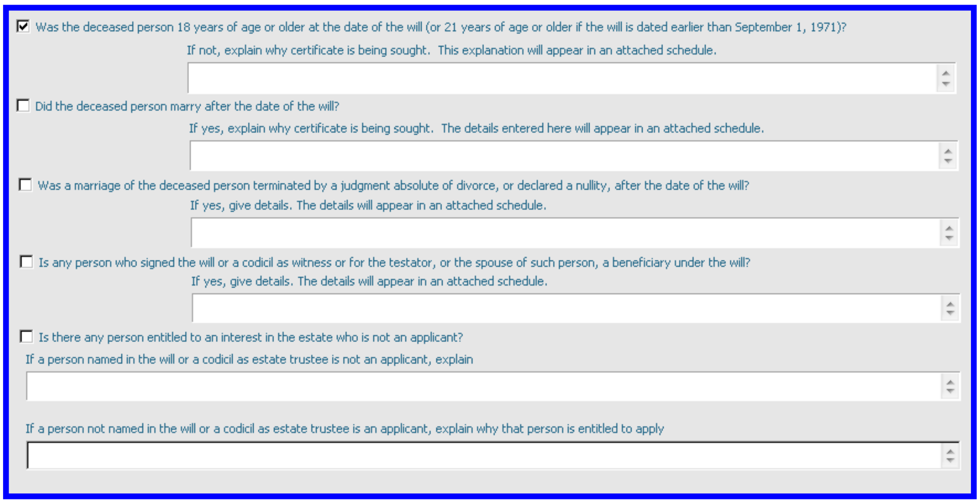
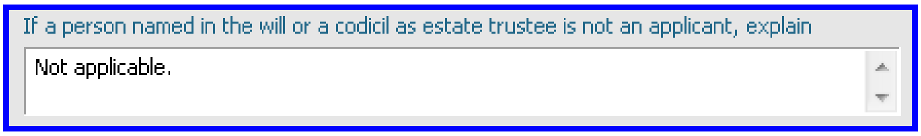
Gather Estate Information

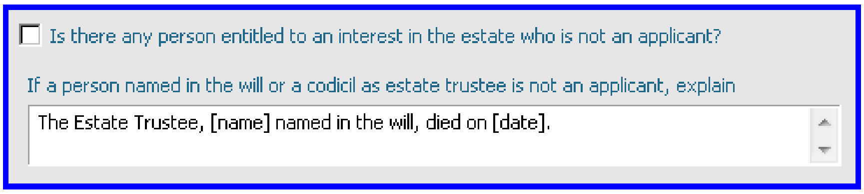
At the *Gather Will Information* dialog, all fields are now visible.



For fields that do not require an attached Schedule, the words "not applicable" can easily be typed in, if desired, and will then populate into the forms.



Any text typed into the field at the question "If a person named in the will … is not an applicant" will populate into a Certificate of Appointment, for example:



CERTIFICATE OF APPOINTMENT OF ESTATE TRUSTEE WITH A WILL

Applicant	Address	Occupation
John Doe	2400 Somewhere Street, Toronto, ON M5K 3L9	Pilot
The Estate Trustee, [name] named in the will, died on [date].		

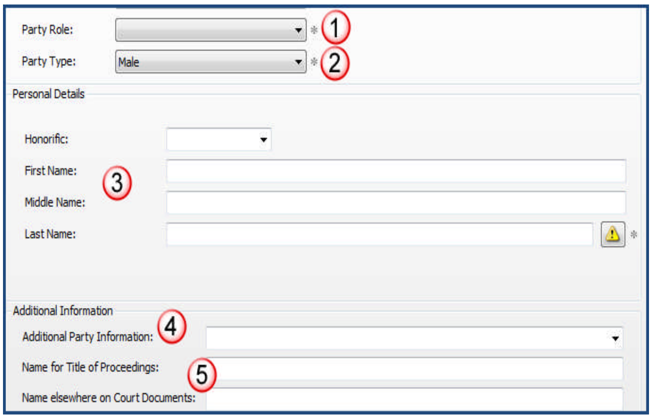
NOTE: If the words "Not Applicable" are typed into the above field, they will populate the Application form, but they will also populate on the Certificate of Appointment.

A file can be opened in ACL with minimal information to generate court forms quickly. Further information can always be added at a later date. Addresses, phone and fax numbers and email addresses for clients are often not required for most court documents.

Click on **Create New**. Enter all necessary details at the **File Details** page. Navigate to the **Parties** task pane to begin entering the party information.

To add *your client:*

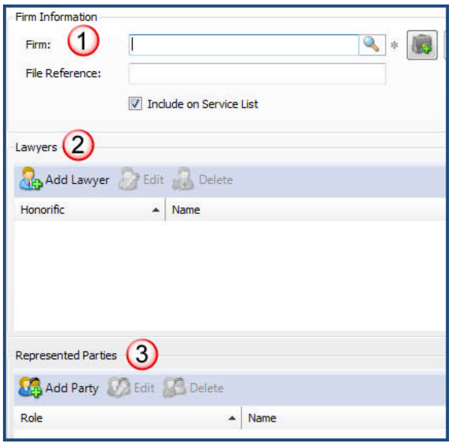
1. Select the **Party Role**
2. Select the **Party Type**
3. Enter the **First Name, Middle Name and Last Name** or the **Organization Name** if the party is a corporation
4. Enter any **Additional Party Information**
5. Ensure the **Name for Title of Proceedings** and **Name for elsewhere on Court Documents** are correct



To add a *self represented party*, repeat steps 1 through 5 as noted above.

To add a *lawyer represented party*:

1. Select or Add the opposing **Firm**
2. Enter the **Lawyers**
3. Enter the name of the **Represented Party**



NOTE: Review the **Order Parties, Title of Proceedings**, **Service Details**, and **Backpage** task panes to ensure all information is correct.

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