

TRUST SERVICE TRAINING - LEVEL 3

SESSION 8.1

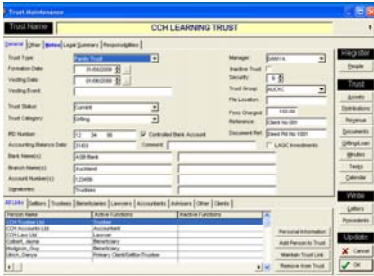
UNDERSTANDING TEMPLATES & MERGE FIELD

- The Trust Service contains data relating to both the People and the Trust
- The Trust Service contains Templates of documents you may wish to produce
- The Templates contain Bookmarks or Merge Fields to combine the Data & the Templates into Documents
- The Trust Service contains 4 Wizards; Precedents Wizards, Gifting Wizard, Minute Wizard & Letter Wizard. These are the tools which combine the Templates & the Data to create Documents

See diagram on Page 2

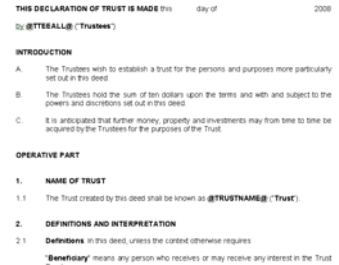
CREATING DOCUMENTS FROM TEMPLATES

TRUST SERVICE DATABASE



Contains the information on the Trust and the People involved in the Trust

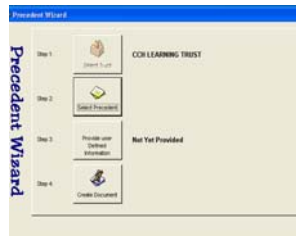
TRUST SERVICE DOCUMENT LIBRARY



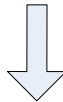
Contains the Document Templates with Bookmarks (merge fields) to insert information



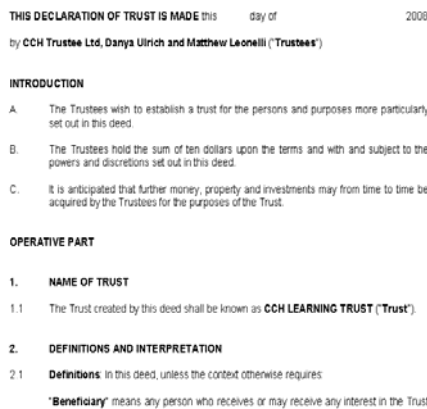
TRUST SERVICE WIZARDS



Merges Template & Data



DOCUMENT CREATED IN WORD



Document Template & Data is Merged

TYPES OF BOOKMARK (MERGE FIELDS)

There are 2 types of Bookmark in the Trust Service

1. Basic Bookmarks
2. User Defined Bookmarks

Basic Bookmarks

Basic Bookmarks are used to put specific information into a document, for example

@TRUSTNAME@ will insert the Trust Name into the document

If a template contains only Basic Bookmarks there will be no 'Step 3' when using the Wizard to create the document.



There are over 600 Basic Bookmarks that can be inserted into templates.

Basic Bookmarks are used when the data to be included is always the same in this document, for example Trust Name, Settlor Name, Trustee Names.

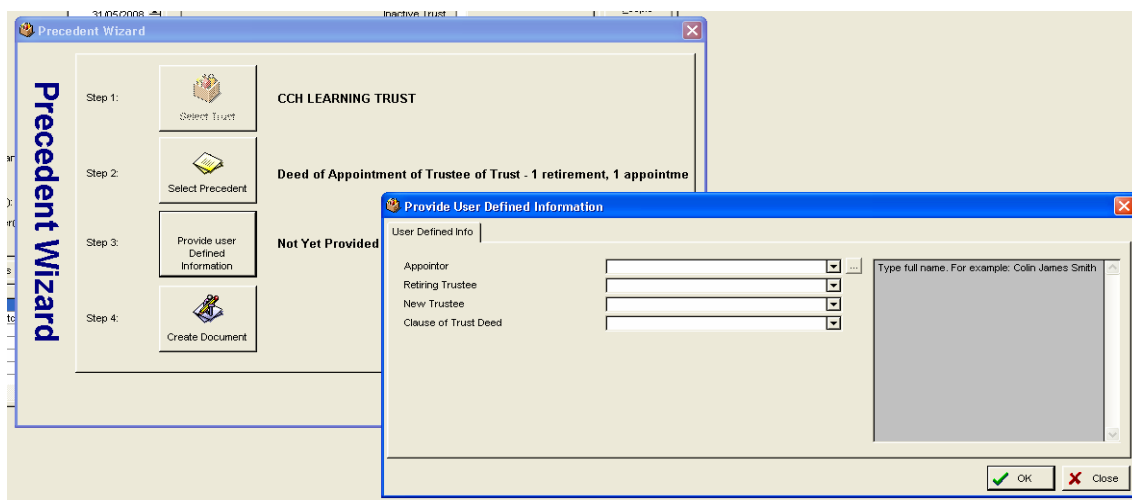
User Defined Bookmarks

User Defined Bookmarks are used to create lists & choices of information that the user can add to the document.

User Defined bookmarks are shown as @USERDEF1@ & need a second level of set up where the User defines what information is to be inserted.

User Defined Bookmarks are used when there is no appropriate Standard Bookmark for your purpose.

When a template contains User Defined Bookmarks you will be asked to select options or type information in Step 3 of the Wizard



User Defined Bookmarks are used when the information could vary each time you create the document, for example a financial balance. They are also used where you may need to select a name from a list of People, for example where there is more than 1 Trustee & you only wish to include the name of 1.

User Defined Bookmarks can be set up as:-

- A list of names to select from (anyone associated with the Trust)
- A list of addresses to select from (anyone associated with the Trust)
- A list of Options that you set up for the user to select from
- An area for the User to free type information
- A selection of Gifting information, i.e dates & balances (if template is to be used from the Gifting Wizard)