

TRUST SERVICE TRAINING - LEVEL 3

SESSION 8.3

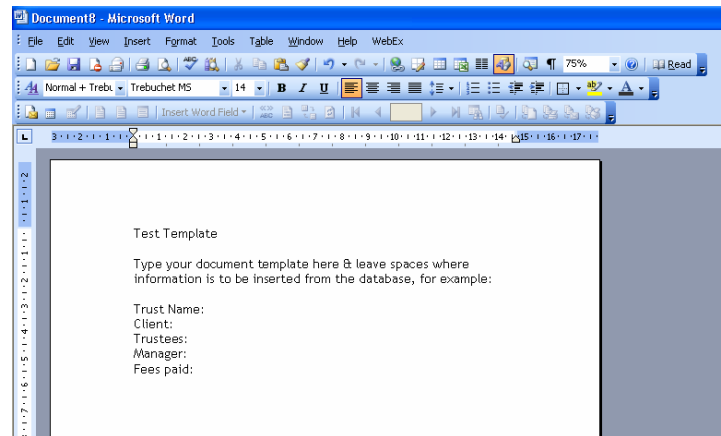
CREATE YOUR OWN DOCUMENT TEMPLATE - CONTAINING BASIC BOOKMARKS ONLY

There are 4 Steps to creating your own Templates with Basic Bookmarks

1. Create your template
2. Insert your template into the Trust Service Document Library
3. Insert your Bookmarks
4. Complete the Authors Notes & Bookmark List - Optional

STEP 1 - Creating a Template

Open Word & create your document Template

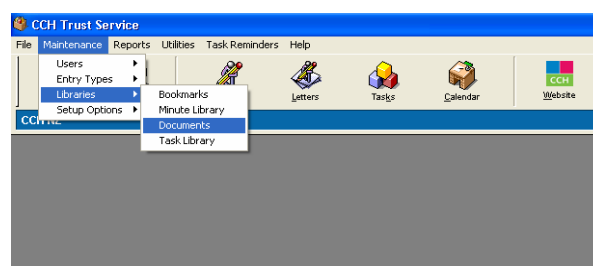


Save the template into TMS\DOCS (usually found on the L:\ or T:\ drive)

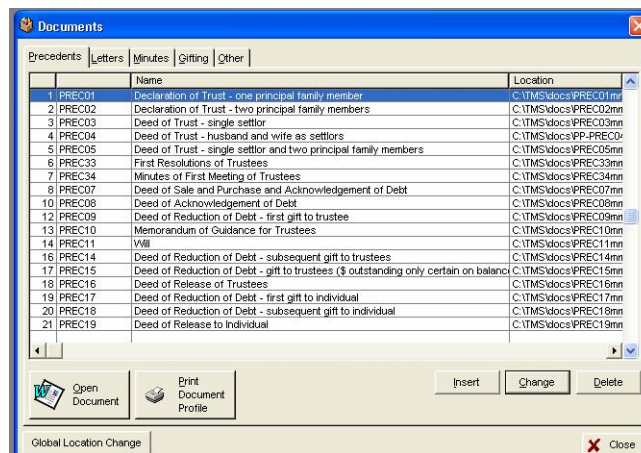
Note: If you are using an existing document as your template this can be saved (or copy & paste) directly into the TMS\DOCS folder. Ensure you remove any existing data merge fields before you do this. The document should be plain text only.

STEP 2 - Inserting a Template into the Document Library

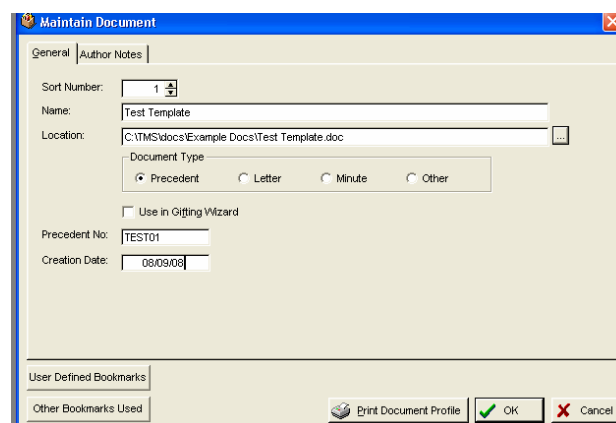
Select Maintenance, select Libraries, select Documents to open the Document Library



Select Insert



Type or select the Sort order - this will determine where the document appears on the list (as above)



Type the Name of your Template

Use the Search Box at the end of the Location box to browse your network and find your template

Select the Type of Template you are creating - this will put the document into the correct Wizard when you want to use the Template to create a document

Check the box 'Use in Gifting Wizard' if this is a Gifting Template

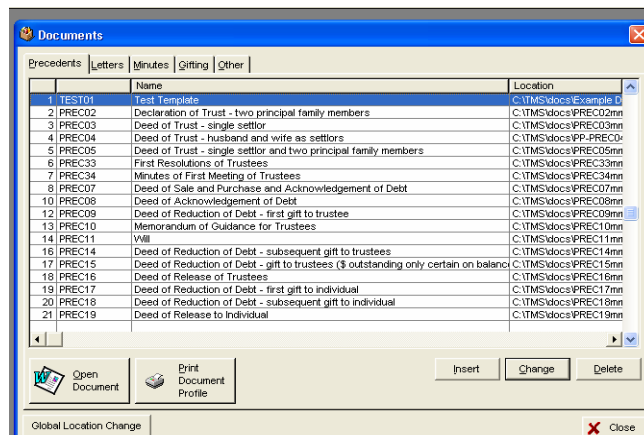
Type a Precedent Number

Type a Creation Date

Select OK to Save

STEP 3 - Inserting Bookmarks into the Template

Highlight your new Template and select Open Document



You are now ready to insert the Bookmarks (merge fields)

See Session 7 for details on how to print a full list of available Bookmarks, also attached in Appendix 1 (REPORTS/SETUP/BOOKMARKS/CHECK ALL BOXES/PRINT)

Type the Bookmark required into the relevant place in your Template

Trust Name: @TRUSTNAME@ [will insert the name of the Trust]
 Client: @CLIENT1FULL@ [will insert the name of Client 1]
 Trustees: @TTEEALL@ [will insert the names of ALL trustee]

My Test Template now looks like this

Test Template

Type your document template here & leave spaces where information is to be inserted from the database, for example:

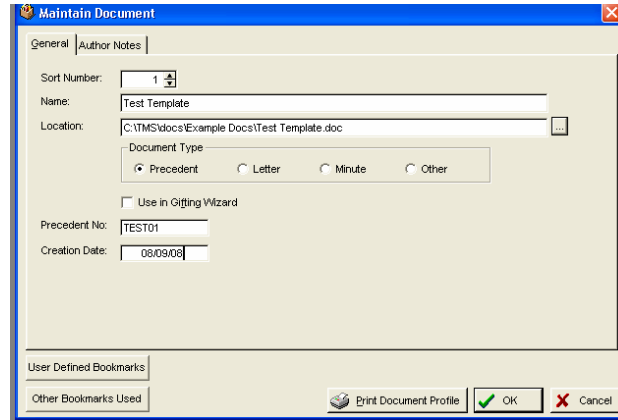
Trust Name: @TRUSTNAME@
 Client: @CLIENT1FULL@
 Trustees: @TTEEALL@

Once you have inserted all of your Bookmarks Save & Close the Template

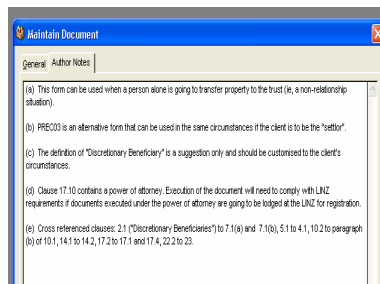
STEP 4 - Completing the Authors Notes

This is optional but is recommended as good practice.

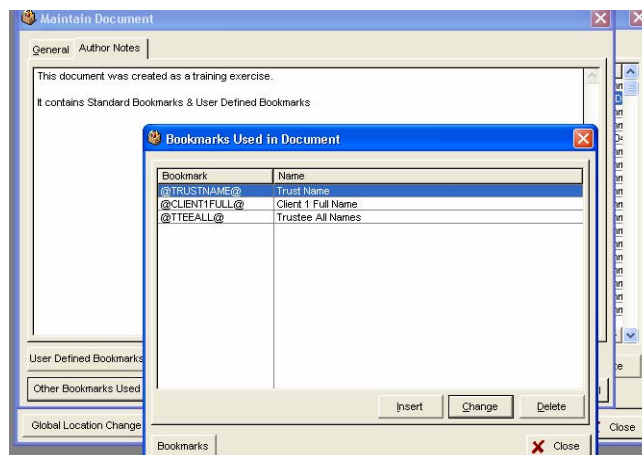
In the Document Library (MAINTENANCE/LIBRARIES/DOCUMENT), highlight your Template & select Change



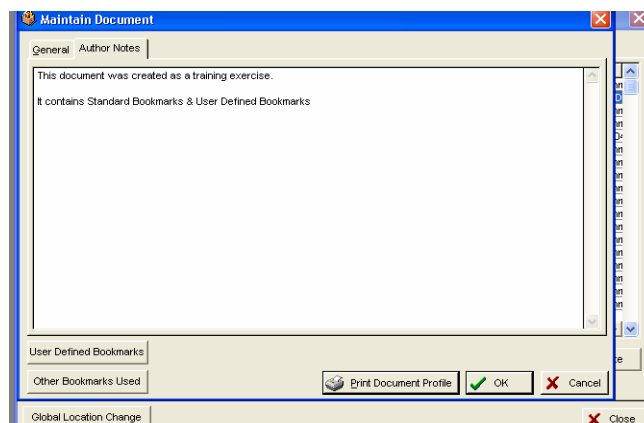
Select Authors Notes & Type some information about this document and it's use. Example below is from CCH Prec01



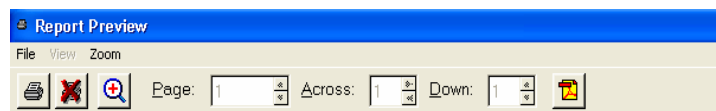
Select Other Bookmarks Used & Insert all Standard Bookmarks you used in this Template



You can now select Print Document Profile.



The Document Profile contains information on why the document was created and what information is going to be inserted from the database via the Bookmarks



Document Profile
CCH NZ

Printed: 09/08/08 14:43

Document Name: TestTemplate
 Document Location: C:\MSD08\Example Docs\TestTemplate.doc
 Precedent No: TEST01
 Creation Date: September 8, 2008

Author Notes

This document was created as a training exercise.
 It contains Standard Bookmarks & User Defined Bookmarks

Standard Bookmarks Used

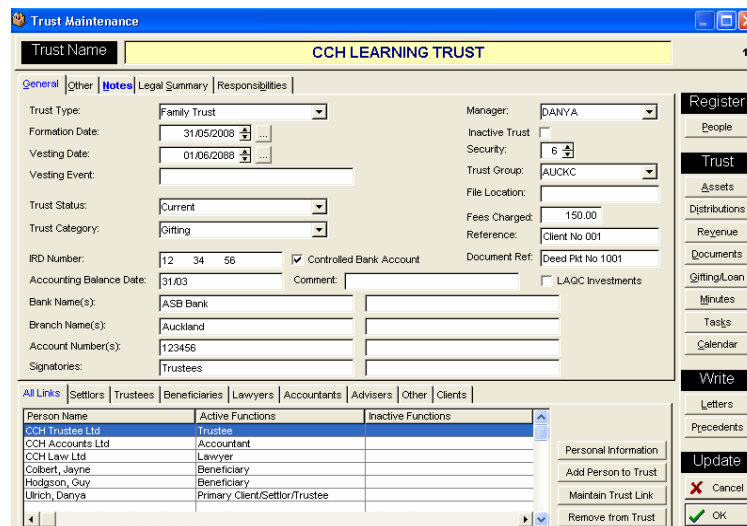
Bookmark	Description
@TRUSTNAME@	Trust Name
@CLIENTFULL@	Client Full Name
@TTEEALL@	Trustee All Names

You can use these profiles as a dictation tool or as a form for partners to complete when they want a document produced. This will ensure that you are always given the full information you need for each document.

Your Template is now complete & ready to use.

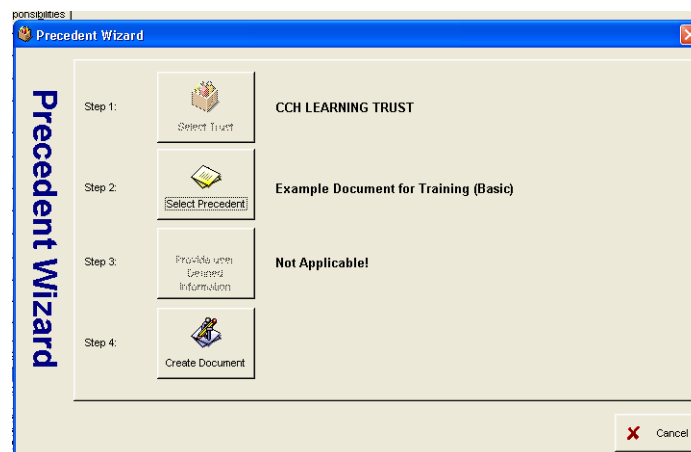
TESTING THE TEMPLATE

Open the Trust



The screenshot shows the 'Trust Maintenance' window for 'CCH LEARNING TRUST'. The 'General' tab is active, displaying various fields for trust details. The 'Trust Name' is 'CCH LEARNING TRUST'. The 'Trust Type' is 'Family Trust', 'Formation Date' is '31/05/2008', and 'Vesting Date' is '01/06/2008'. The 'Trust Status' is 'Current' and 'Trust Category' is 'Gifting'. The 'Manager' is 'DANYA'. The 'Trust Group' is 'AUCKC'. The 'Fees Charged' is '150.00'. The 'Reference' is 'Client No 001' and 'Document Ref.' is 'Deed Pit No 1001'. The 'Bank Name(s)' is 'ASB Bank', 'Branch Name(s)' is 'Auckland', and 'Account Number(s)' is '123456'. The 'Signatories' are 'Trustees'. A table at the bottom lists active functions for various persons, including 'CCH Trustee Ltd' (Trustee), 'CCH Accounts Ltd' (Accountant), 'CCH Law Ltd' (Lawyer), 'Colbert, Jayne' (Beneficiary), 'Hodgson, Guy' (Beneficiary), and 'Ulrich, Danya' (Primary Client/Settlor/Trustee). The right-hand side contains a vertical menu with options like 'Register', 'Trust', 'Assets', 'Distributions', 'Revenue', 'Documents', 'Gifting/Loan', 'Minutes', 'Tasks', 'Calendar', 'Write', 'Letters', 'Precedents', 'Update', 'Cancel', and 'OK'.

Select Precedents, in Step 2 select your new Template



The screenshot shows the 'Precedent Wizard' window. It is a multi-step process. Step 1: 'Select Trust' with 'CCH LEARNING TRUST' selected. Step 2: 'Select Precedent' with 'Example Document for Training (Basic)' selected. Step 3: 'Provide user Defined Information' with 'Not Applicable!'. Step 4: 'Create Document'. A 'Cancel' button is at the bottom right.

Step 3 should be shown as Not Applicable as we used only Basic Bookmarks

Step 4 Create Document

The Results.....

Test Template

Type your document template here & leave spaces where information is to be inserted from the database, for example:

Trust Name: CCH LEARNING TRUST
 Client: Danya Ulrich
 Trustees: CCH Trustee Ltd, Danya Ulrich and Matthew Leonelli