

# TRUST SERVICE TRAINING - LEVEL 3

## SESSION 8.3

### CREATE YOUR OWN LETTER TEMPLATES

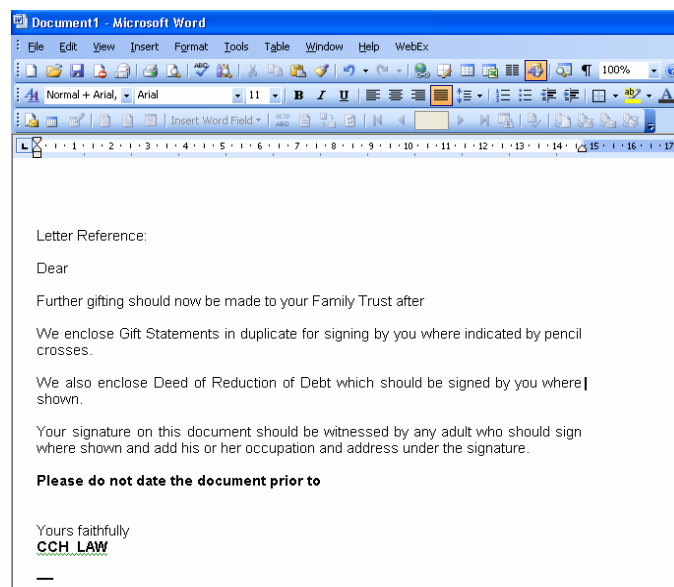
There are no letter templates supplied with the Trust Service.

Creating Letter Templates requires the same 4 or 5 steps as described in 8.3 & 8.4

1. Create your template
2. Insert your template into the Trust Service Document Library
3. Insert your Bookmarks
4. Configure User Defined Bookmarks (if used)
5. Complete the Authors Notes & Bookmark List - Optional

### STEP 1 - Creating a Template

Open Word & create your Template

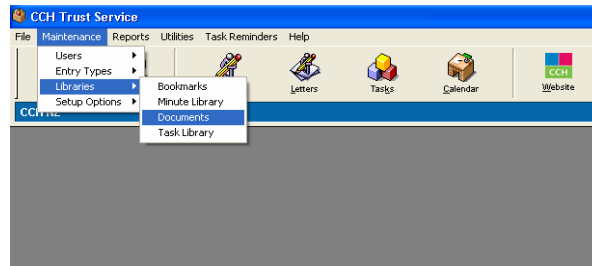


Save the template into TMS\DOCS (usually found on the L:\ or T:\ drive)

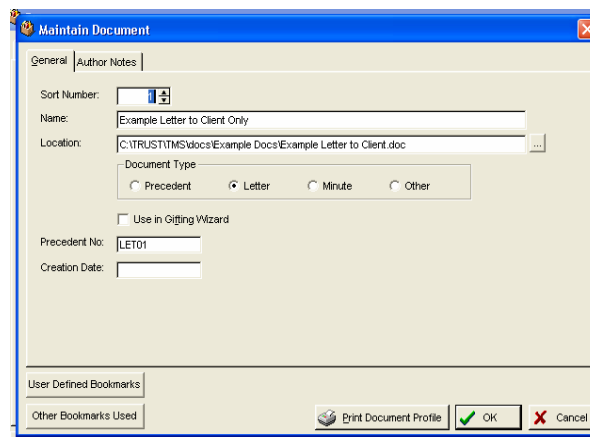
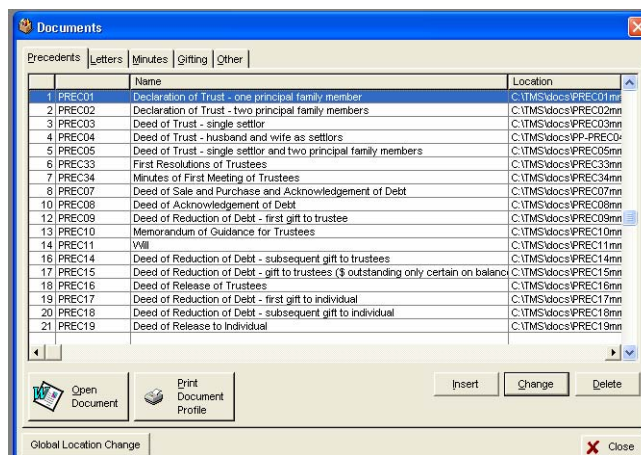
Note: If you are using an existing document as your template this can be saved (or copy/paste) directly into the TMS\DOCS folder. Ensure you remove any existing data merge fields before you do this. The document should be plain text only.

## 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

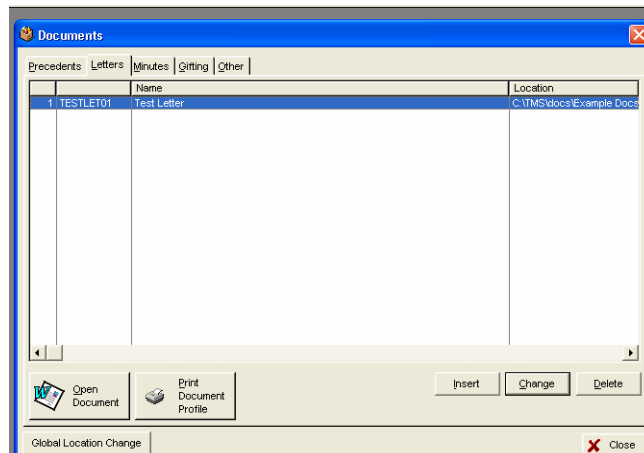
Select the Type - Letter

Type a Precedent Number & 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)

There are 2 types of Bookmarks you can use with a Letter

1. Standard Bookmarks, e.g @CLIENT1FULL@ will insert the Full Name of Client1 into document. Use this if the letter is always to the client only
2. User Defined Bookmarks, e.g @USERDEF1@ can be configured to insert any information you require into the document, this is inserted via the Letter Wizard. Use this when there is no appropriate Standard Bookmark for your purpose.

#### Step 3 Standard Bookmarks

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

Type the Bookmark required into the relevant place in your Template, for example

Standard Bookmarks

@CLIENT1FULL@

@CLIENT1ADD1@

@CLIENT1ADD2@

@CLIENT1ADD3@

@CLIENT1ADD4@

If you are able to complete your Template using only Standard Bookmarks you are now ready to test the Template.

Save & Close your Template. Skip Step 4 and move straight to Testing the Template

## Step 4 User Defined Bookmarks

If a Standard Bookmark does not exist for the information you want to insert you can use a User Defined Bookmark, for example if the name to be inserted is not always the Trustee or always the Client you can set yourself up with a list of People to select from.

See Session 8.4 for full details on the set up of User Defined Bookmarks

User Defined Fields give you the options to set up

- A list of all the people associated with the Trust to select from
- A list of options of your choice (for information not contained within the database)
- A date
- A box in which to free type information

In this example I will use

@USERDEF1@	Date of Gifting
@USERDEF2@	Earliest Date of Signature of Doc
@USERDEF3@	Name of Manager

My Test Template now looks like this

@CLIENT1FULL@  
@CLIENT1ADD1@  
@CLIENT1ADD2@  
@CLIENT1ADD3@  
@CLIENT1ADD4@

Letter Reference: @TRUSTNAME@

Dear @CLIENT1FNAME@

Further gifting should now be made to your Family Trust after @USERDEF1@

We enclose Gift Statements in duplicate for signing by you where indicated by pencil crosses. We also enclose Deed of Reduction of Debt which should be signed by you where shown.

Your signature on this document should be witnessed by any adult who should sign where shown and add his or her occupation and address under the signature. **Please do not date the document prior to @USERDEF2@**

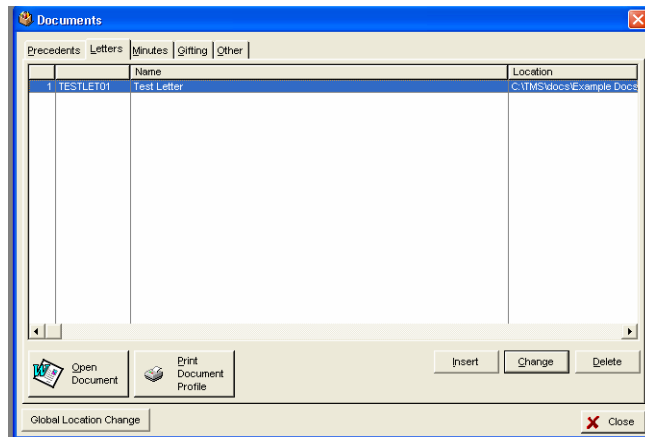
Yours faithfully  
**CCH TRUSTEES LTD**

@USERDEF3@

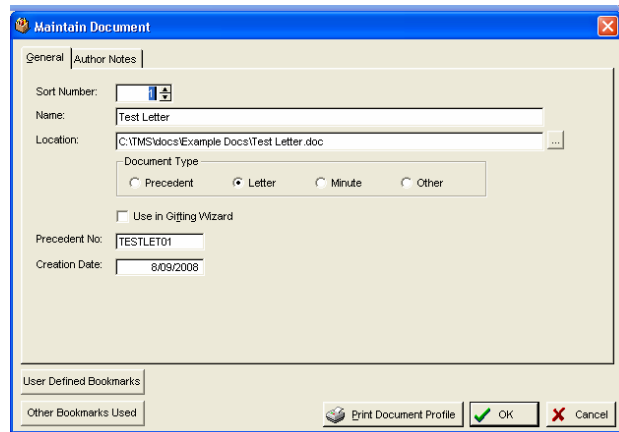
Once you have inserted all of your Bookmarks Save & Close the Template

You must now tell the Trust Service what information you would like to insert for each of the User Defined Fields.

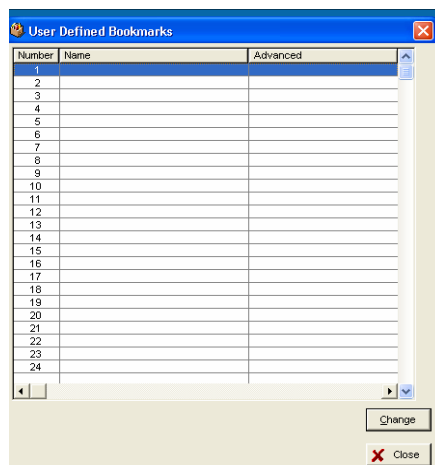
Highlight your template on the Document Library



Select Change, to open the screen below

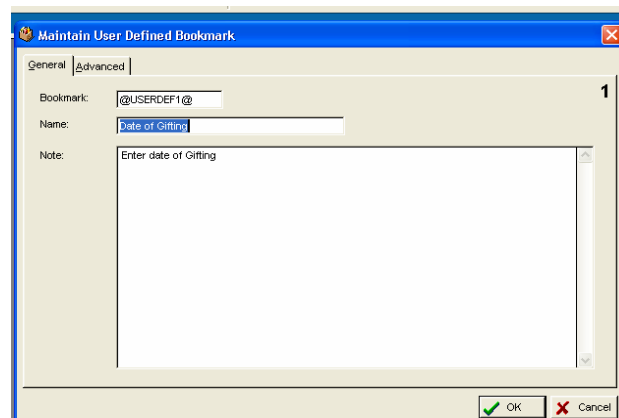


Select User Defined Bookmarks



This is now your opportunity to specify what information you want to bring into your document for each of your User Defined Bookmarks

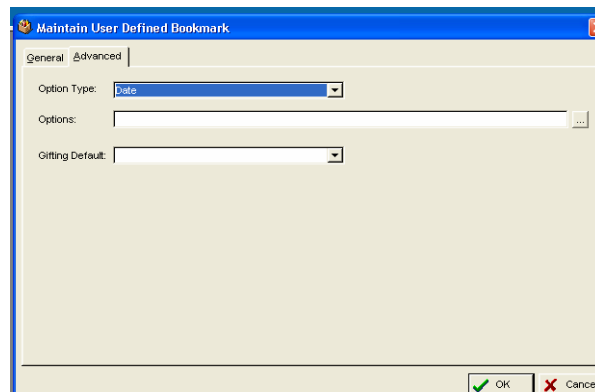
Highlight number 1 on the list & select Change



Type the Name for your first User Defined Field

Type a note that will remind you what is required here when you create a document from this template

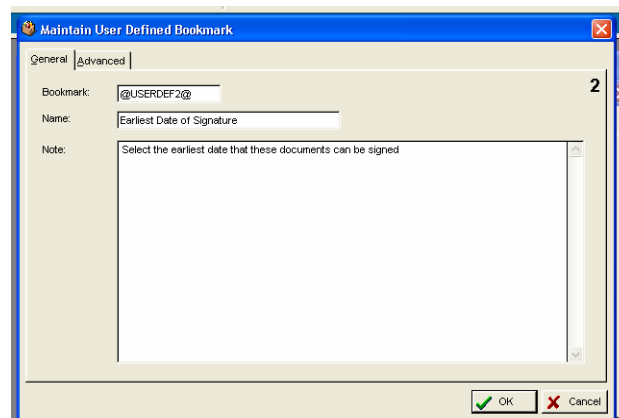
Select Advanced



In this example we will select the Option Type 'Date'.  
Select OK to Save

User Defined Field number 1 is completed

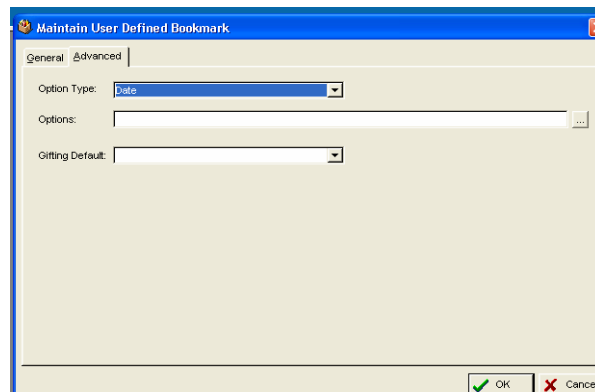
Highlight number 2 on the list & select Change



Type the Name for your 2<sup>nd</sup> User Defined Field

Type a note that will remind you what is required here when you create a document from this template

Select Advanced



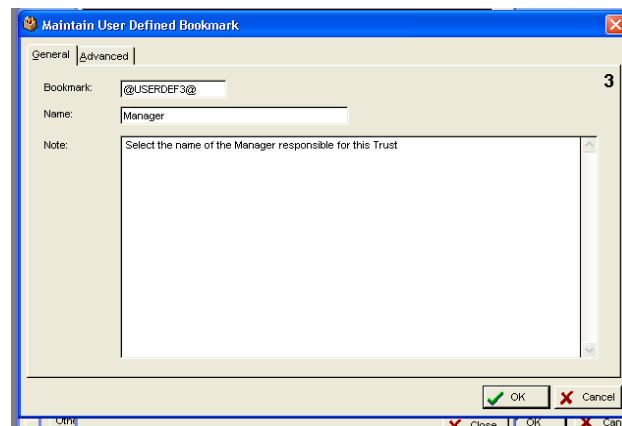
In this example we will select the Option Type 'Date'.

Select OK to Save

Select OK to Save

User Defined Field number 2 is completed

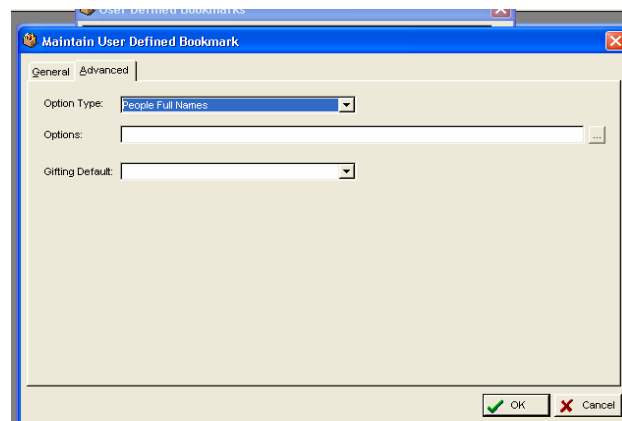
Highlight number 3 on the list & select Change



Type the Name for your 3<sup>rd</sup> User Defined Field

Type a note that will remind you what is required here when you create a document from this template

Select Advanced



In this example we will select the Option Type 'People Full Names'.

Select OK to Save

User Defined Field number 3 is completed

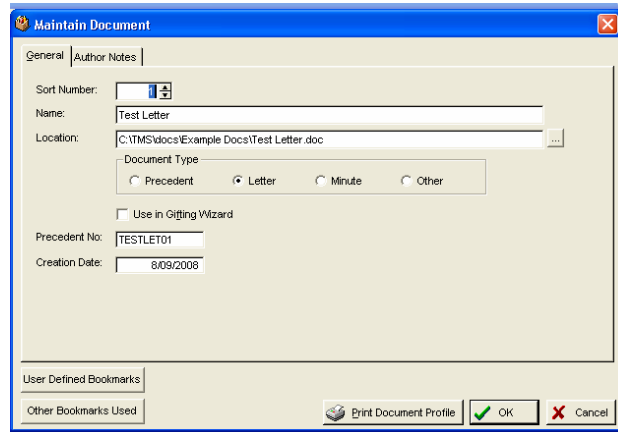
Select OK to Save your Template.

## STEP 5 - Completing the Authors Notes

This is optional but is recommended as good practice.

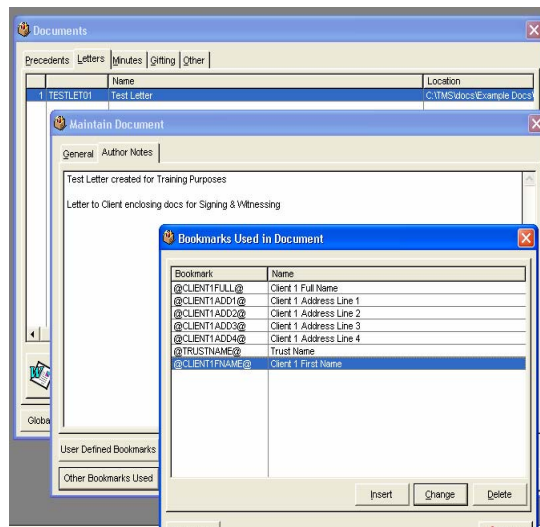
Return to the Document Library (MAINTENANCE/LIBRARIES/DOCUMENT)

Highlight your Template & select Change



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

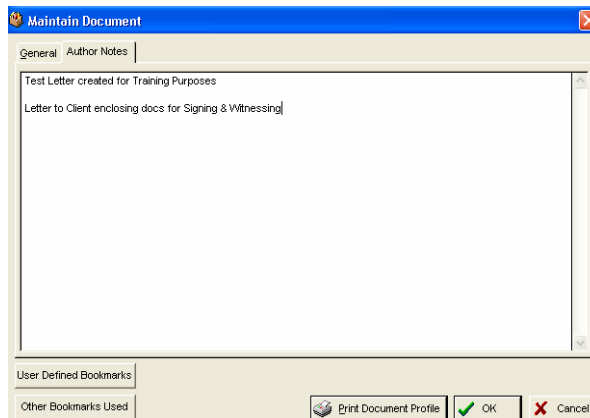
Select Other Bookmarks Used & Insert all Standard Bookmarks you used in this Template



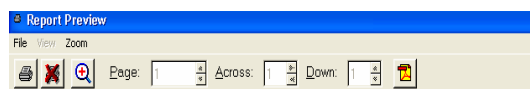
Bookmark	Name
@CLIENT1.FULL@	Client 1 Full Name
@CLIENT1.ADD1@	Client 1 Address Line 1
@CLIENT1.ADD2@	Client 1 Address Line 2
@CLIENT1.ADD3@	Client 1 Address Line 3
@CLIENT1.ADD4@	Client 1 Address Line 4
@TRUSTNAME@	Trust Name
@CLIENT1.FIRST@	Client 1 First Name

Information for User Defined Bookmarks is included automatically

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

Print: 8/28/07 16:33

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Document Name: TestLetter  
 Document Location: C:\TM90000\Example Doc\TestLetter.doc  
 Precedent No: TESTLETDI  
 Creation Date: September 8, 2007

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**Author Notes**

Test Letter created for Training Purposes  
 Letter to Client enclosing docs for Signing & Witnessing

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**Standard Bookmarks Used**

Bookmark	Description
@CLIENTFULL@	Client Full Name
@CLIENTAD0@	Client Address Line 1
@CLIENTAD0@	Client Address Line 2
@CLIENTAD0@	Client Address Line 3
@CLIENTAD0@	Client Address Line 4
@TRUSTNAME@	Trust Name
@CLIENTFNAME@	Client First Name

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**User Defined Fields Used**

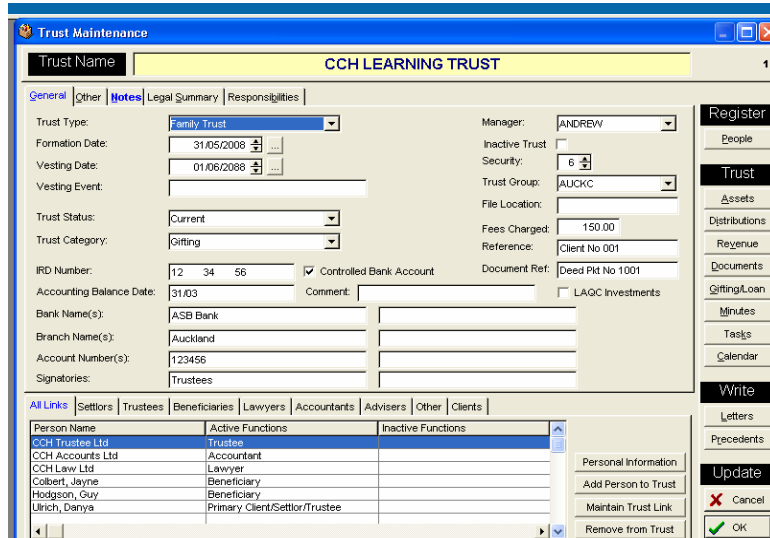
Bookmark	Description
@USERDEF1@	Date of Birth Date of Birth
@USERDEF2@	Earliest Date of Signature Select the earliest date that these documents can be signed
@USERDEF3@	Manager Select the name of the Manager responsible for this Trust

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 & Select Letters



**Trust Maintenance**  
**Trust Name** CCH LEARNING TRUST

General | Other | Notes | Legal Summary | Responsibilities

Trust Type: Family Trust  
 Formation Date: 31/05/2008  
 Vesting Date: 01/06/2008  
 Vesting Event:  
 Trust Status: Current  
 Trust Category: Gifting

Manager: ANDREW  
 Inactive Trust:  
 Security: 6  
 Trust Group: AUCKC  
 File Location:  
 Fees Charged: 150.00  
 Reference: Client No 001  
 Document Ref: Dead Pit No 1001

IRD Number: 12 34 56  
 Accounting Balance Date: 31/03  
 Bank Name(s): ASB Bank  
 Branch Name(s): Auckland  
 Account Number(s): 123456  
 Signatories: Trustees

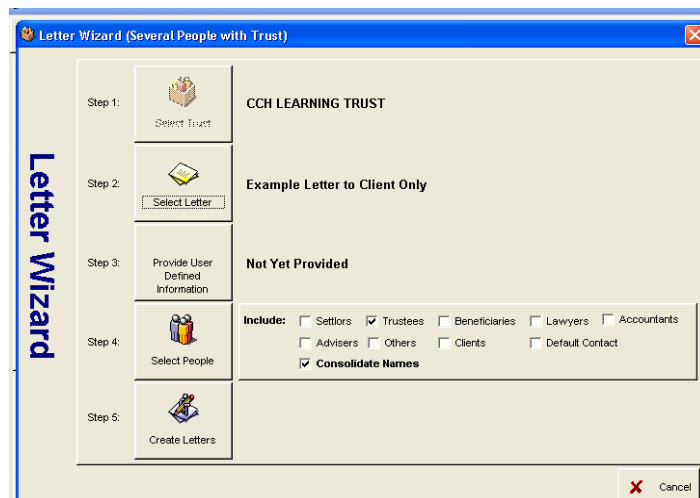
Person Name	Active Functions	Inactive Functions
CCH Trustees Ltd	Trustee	
CCH Accounts Ltd	Accountant	
CCH Law Ltd	Lawyer	
Colbert, Jayne	Beneficiary	
Hodgson, Guy	Beneficiary	
Ulrich, Danya	Primary Client/Settlor/Trustee	

Register  
 People  
 Trust  
 Assets  
 Distributions  
 Revenue  
 Documents  
 Gifting/Loan  
 Minutes  
 Tasks  
 Calendar

Write  
 Letters  
 Precedents


Update  
 Add Person to Trust  
 Maintain Trust Link  
 Remove from Trust


This opens the Letter Wizard. Step 1 will be completed.





**Letter Wizard (Several People with Trust)**

Step 1:  **CCH LEARNING TRUST**

Step 2:  **Example Letter to Client Only**

Step 3:  **Not Yet Provided**

Step 4:  **Include:**  Settlers  Trustees  Beneficiaries  Lawyers  Accountants  
 Advisers  Others  Clients  Default Contact  
 **Consolidate Names**

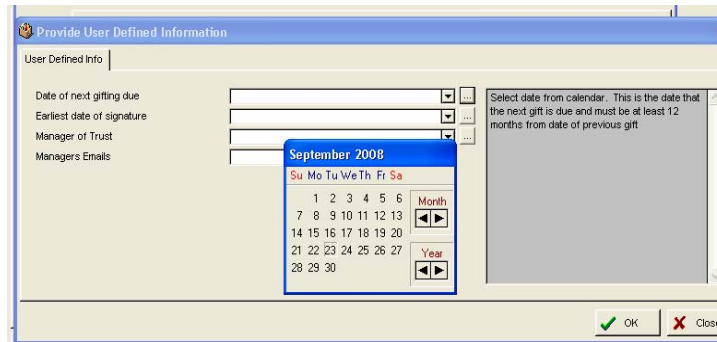
Step 5:  **Create Letters**

Cancel

Step 2 - Select the Letter

Step 3 - Complete the User Defined Fields that were just configured

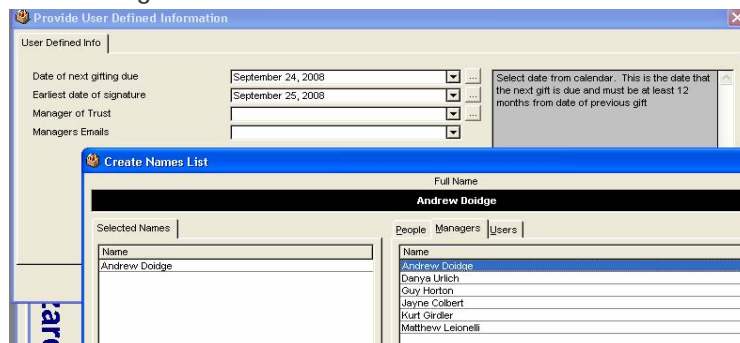
### User Defined 1 - Select Date from Calendar



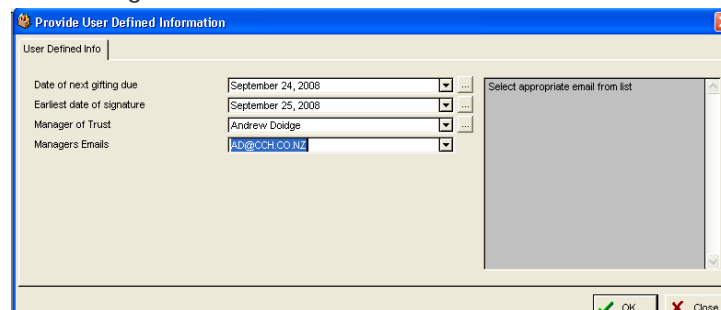
### User Defined 2 - Select Date from Calendar



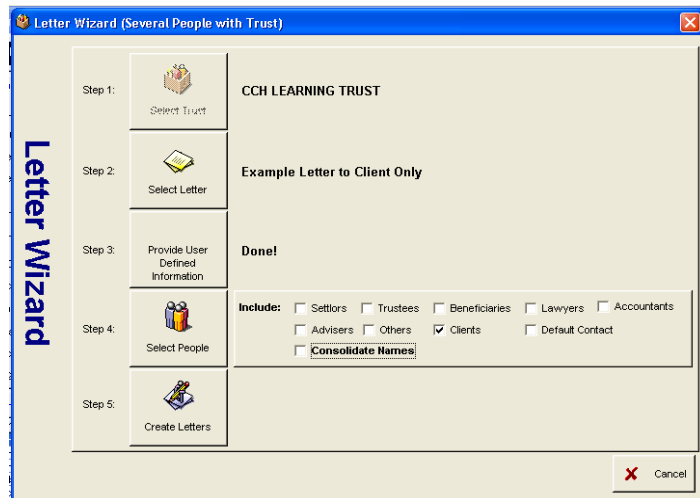
### User Defined 3 - Select Manager from list



### User Defined 4 - Select Manager's Email from list



Step 4 - Select who will receive this Letter. Remember this letter will only ever be addressed to the Client as those are the Bookmarks we used (@CLIENT1NAME@)



Note: We will look at how to send letters to multiple people in 8.6

Step 5 - Create Letter

The Results.....

Danya Ulrich  
66 Dominion Road  
Takapuna  
North Shore

Letter Reference: CCH LEARNING TRUST

Dear Danya

Further gifting should now be made to your Family Trust after September 24, 2008

We enclose Gift Statements in duplicate for signing by you where indicated by pencil crosses.

We also enclose Deed of Reduction of Debt which should be signed by you where shown.

Your signature on this document should be witnessed by any adult who should sign where shown and add his or her occupation and address under the signature.

**Please do not date the document prior to September 25, 2008**

Yours faithfully  
**CCH LAW**

**Andrew Doidge**  
Email: AD@CCH.CO.NZ