

## SESSION 9.2

## LEVEL 3

### Creating a Letter Template (Address Types)

The most complex matter when creating letter templates is creating the address details. There are a number of options for this. The following list some examples which you can cut and paste into your documents. Where extra set up is required explanations are given.

#### Multiple Address Set - using First Name

Fields	Result
@TITLE@ @FNAME@ @LNAME@ @POSTAL1@ @POSTAL2@ @POSTAL3@ @POSTAL4@ @PZIP@  Dear @FNAME@	Mr John Craig Smith 124 Smith Street Balmoral Auckland 2003  Dear John Craig

This address block should be used when you are sending multiple letters on a trust by selecting the roles via the Letter Wizard.

#### Multiple Address Set - using Given Name

Fields	Result
@TITLE@ @GNAME@ @LNAME@ @POSTAL1@ @POSTAL2@ @POSTAL3@ @POSTAL4@ @PZIP@  Dear @GNAME@	Mr John Smith 124 Smith Street Balmoral Auckland 2003  Dear John

This address block is similar to the one above. The only difference instead of using First Names it uses Given Name. You can only use Given Name if you have completed the field when you enter in the personal details.

Note: If you are sending a letter to a company the programme uses the @LNAME@ field so no extra bookmarks are required to handle this.

## Multiple Address Set - Using Initials

Fields	Result
@TITLE@ @PUSER1@ @LNAME@ @POSTAL1@ @POSTAL2@ @POSTAL3@ @POSTAL4@ @PZIP@	Mr J C Smith 124 Smith Street Balmoral Auckland 2003

TMS does not have a separate initial field for individual clients. To create initials you need to create a Person User Defined field via Maintenance > Set Up Options > System Set Up and the People User Defined tab. How to do this is covered in Topic 7.3.

If you have more than one customised field, the number of @PUSERX@ bookmark needs to match.

**Important:** The combine feature which is available when you create letters cannot combine a customised field.

## Individual Client Set

Fields	Result
@CLIENT1FULL@ @CLIENT1ADD1@ @CLIENT1ADD2@ @CLIENT1ADD3@ @CLIENT1ADD4@ @PZIP@  Dear @CLIENT1FNAME@	

If you want to send a letter to a specific client or role you can do so using individual number sets. The example above is for any person/company attached as a client sorted as number 1.

You can do them for:

Clients	1 to 10.
Beneficiaries	1 to 10
Default Contact	1 only
Settlors	1 to 10
Trustee	1 to 10