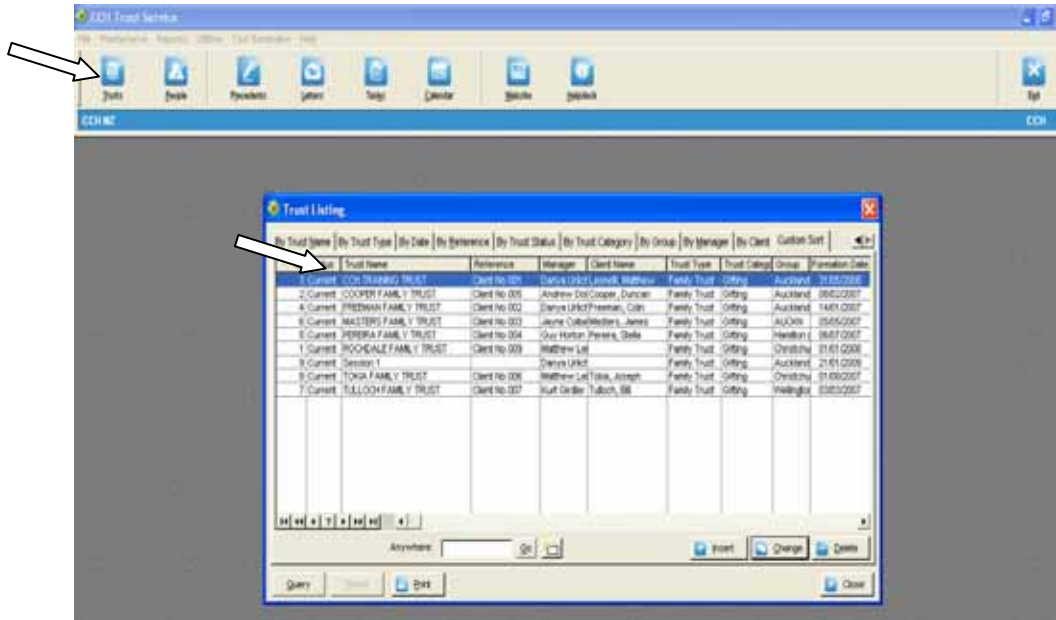


SESSION 3.2

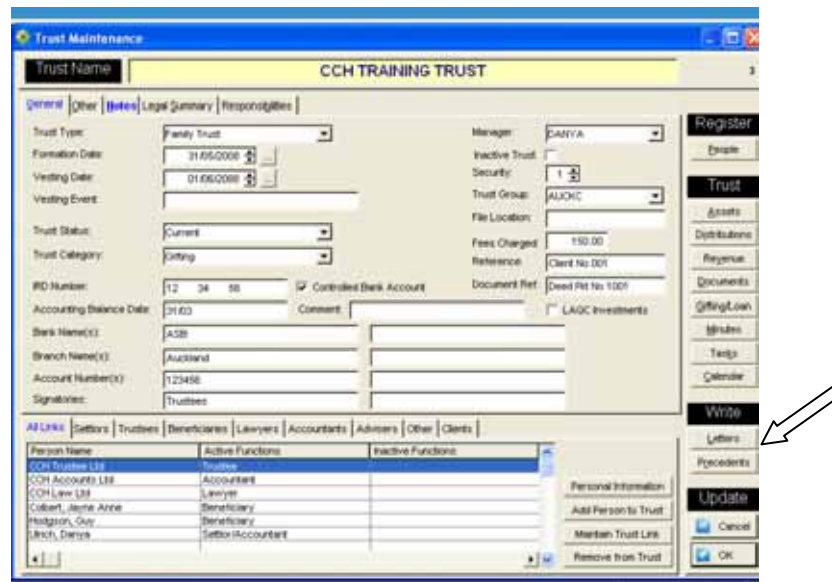
LEVEL 1

CREATING STANDARD DOCUMENTS USING LETTER WIZARD

Select Trust Shortcut, then select By Trust from List (double click or select Change)

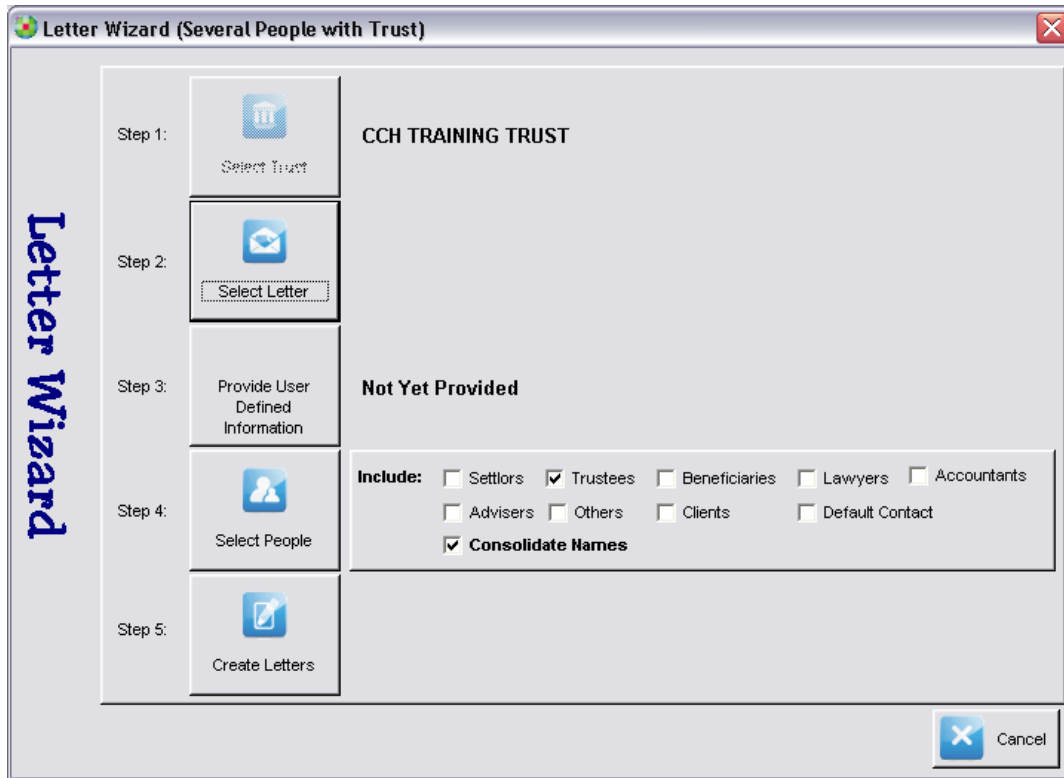


Select Letters from Right Hand Menu to open the Precedent Wizard

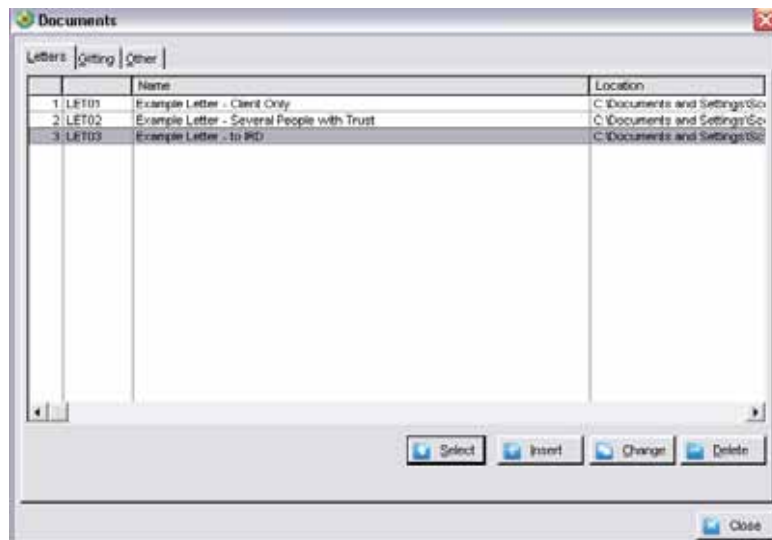


You can open the Letter Wizard from the Top toolbar, however, it is more effective to access it via the Trust record shortcut as you will be able to import more information & reduce additional typing

Step 1 - Select Trust. This will be completed for you if you access the Wizard via the Trust record shortcut . If you have used the Shortcut from the top toolbar you will need to select the Trust



Step 2 - Select Letter



There are three example letters supplied by CCH to show how letters work and provide a starting point for creating your own letters. For more information on this see notes on Session 8.

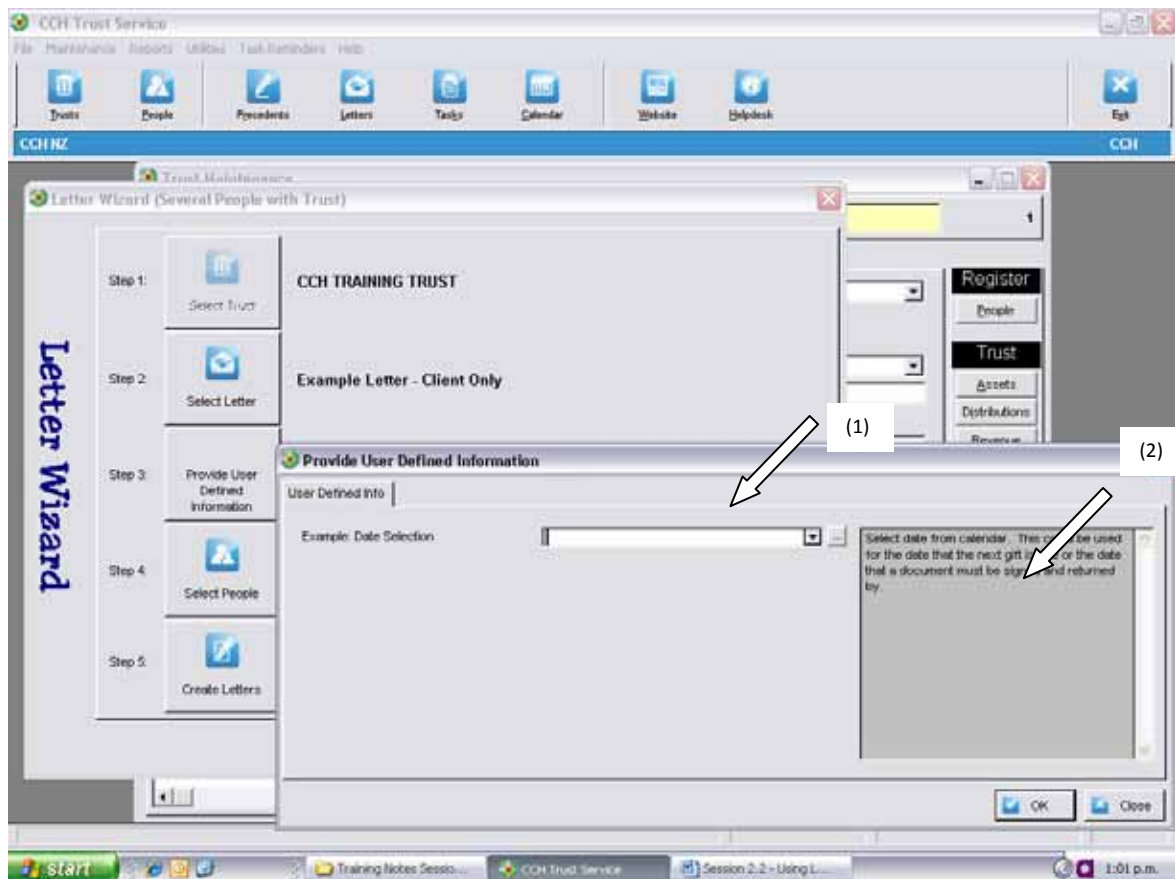
Step 3 - Provide User Defined Information

This is your opportunity to pull through as much information as you can from the Trust Record to reduce typing.

Fields vary from document to document. If there is an arrow at the end of the box, click it to see your options to select from, for example, names of everyone associated with the trust (1)

If there are no option provided you will need to type the information into the box.

The Grey Box to the Right explains what information is required (2)

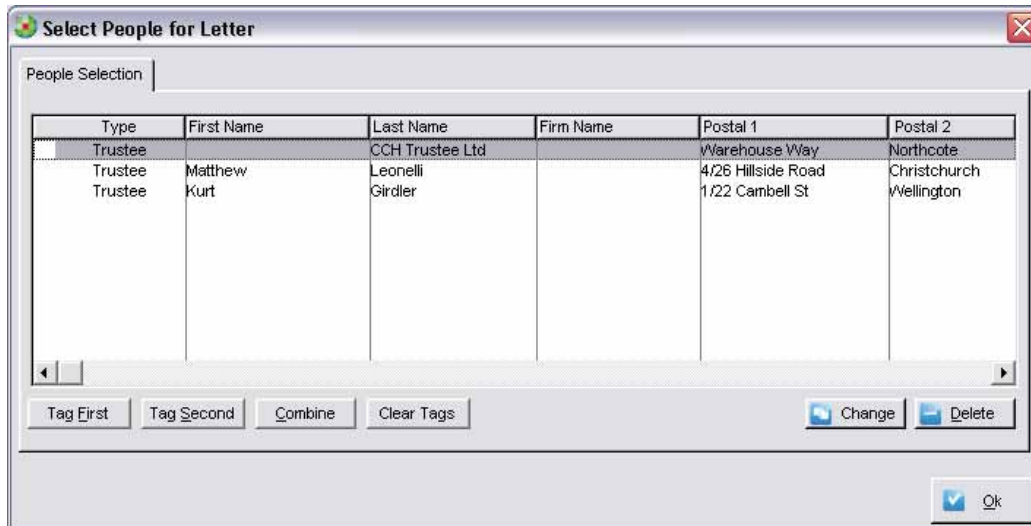


Step 4 - Select People



Select each role type you wish your letter to be sent to. By keeping the Consolidate Names selected each person will only get one letter even if they are attached as multiple roles.

Another option for selecting people is to single click the Select People button itself.



In the Select People for letter screen you can do one of the following:

Select a name of person you don't want the letter to go to and select the delete key. Then OK the confirm box. This will remove them from the list to receive a letter. (They will not be removed from the trust).

If you are sending a letter to a husband and wife, then you can combine their names to produce one letter. To do this, select the name and click the Tag First button. Select the second name and click the Tag Second button. Then select the Combine button.

Note: This function only works if the people chosen have the same last name.

Click the OK button to return to the previous screen.

Step 6 - Create Document (Final Step)

Select the Create Document button and on the bottom of the screen you will see at the bottom of the screen the status of the process ending with Document Completed.

The document is created & may be given a temporary file name (depending on your individual settings). Word should automatically open up with your document.

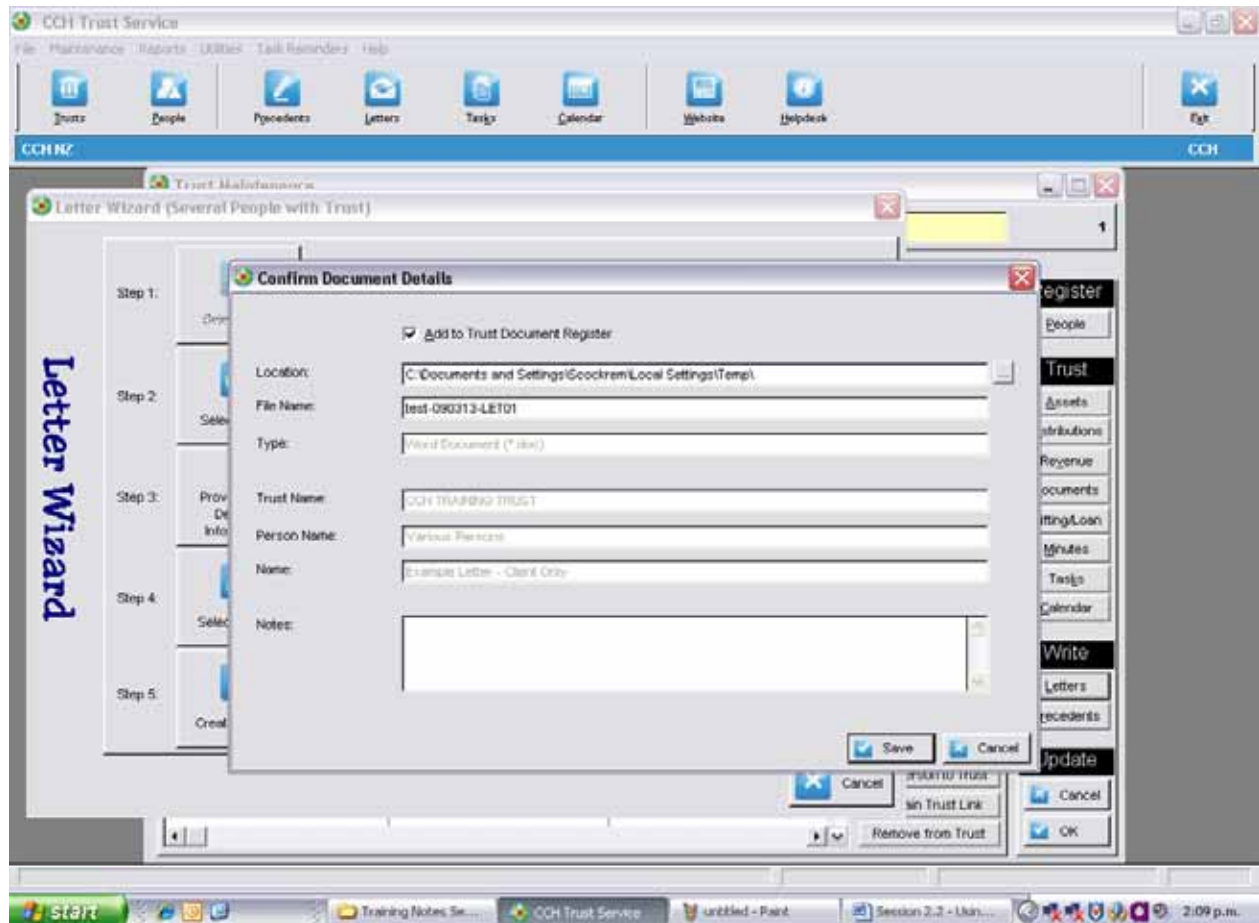
This document is now a Word document like any other. Amendments can be made if required.

It can be saved to the location of your choice.

Step 3 - Additional

You may see the Confirm Document Details Screen before your document is created. This is determined by your user settings. To learn more about this feature see notes on Session 6.

If you are using this setting, this is your opportunity to select where you store the document and what you name it prior to its creation, by using the Buttons provided to change location or by overtyping the name of the document.



You have now created your document using the CCH Template

Once the document is in Word you can edit it in any way you need to for this client. If there are amendments you need to make every time, for example, the margins of the document do not fit within your headed paper, you need to Customise the template. For more information on Customisation see notes on Session 8