EstateWorks™

Letter Writer Guide

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Letter Writer

The Letter Writer module is used to customize letter templates which are available to all users on a case's Reports & Docs tab. A template defines the body of the letter or document and the variables that will be merged from EstateWorks case data.

To access Letter Writer, select **Admin** on the **Manage menu** in the upper right corner of any page.

Creating a New Letter Template

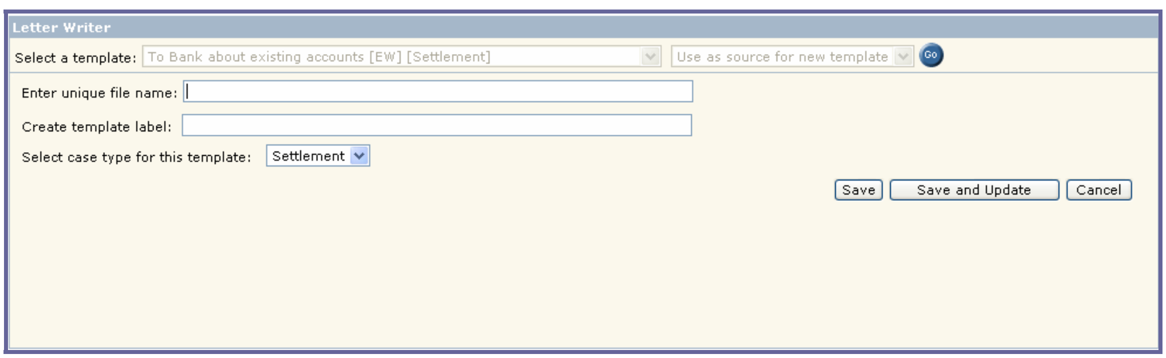
To create a new custom letter template, click on the **Letter Writer** link.

1. Select the Template to copy from the **Select a template** drop down list.

   You **MUST** start initially with one of the EstateWorks template samples. These templates all end with [EW] and cannot be modified or deleted; they are used only as a starting point for a new template. Once you have created a custom template, you can use it as the source for other new templates. When you have your own customized templates, you can contact Customer Support to remove the EstateWorks templates from the Reports & Docs tab.

2. Select **Use as a source for new template** from the Action box. This is the ONLY available selection for [EW] templates. Click **Go.**

3. The page displays three (or four) fields to complete. See below.



- **Enter unique file name** is the internal file name which identifies the template .rtf file. Do not use any special characters in the file name.

- **Create template label** is the description that displays in the **Select a template** field and in the list of client letters on the Reports & Docs tab. Do not use any special characters in the label. Also do not use a valid state abbreviation such as CA for California. Doing so causes the template to display only for cases which use the California checklist.

- **Select case type for this template** determines whether the letter is available for planning or settlement cases.

- **Select the region for this template** (Enterprise Edition only) determines the region for which this letter will be available. The template is included in the list of Client Letters for cases in the selected region. This field is hidden unless regions are implemented in the Enterprise Edition database.

4. Select **Save** or **Save and Update.**

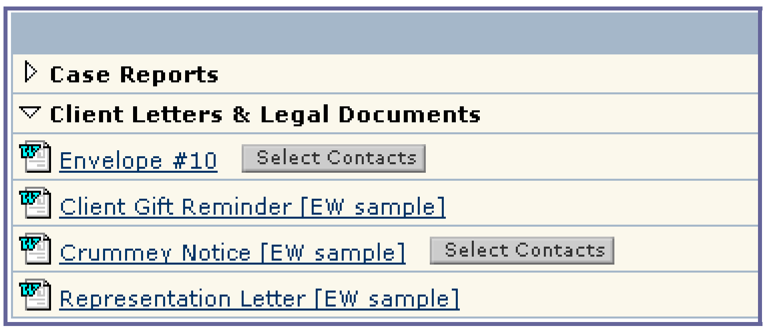
   a. If you choose **Save,** the template is saved directly to EstateWorks and can be modified or updated at a later time. The template becomes available in the **Select a template** drop down list and can be used to generate other templates.

   b. If you choose **Save and Update**, the template is saved and immediately opened for updating in a new window. After the modifications are complete, saved templates are available in the **Select a template** drop down list and can be used to generate other templates.

Choosing the Source Template Type

There are two types of letter templates. The **Standard** letter template produces one copy of the letter when you click on it within a case. A **Select Contacts** letter template produces multiple copies of the letter addressed individually to each contact you select at run time. Select Contacts templates have a button following the template label on the Reports & Docs page for a case.

In the planning case sample below, the *Client Gift Reminder* letter is a Standard template which produces one letter addressed to the client in the case. The *Crummey Notice* is a Select Contacts type template which produces one letter addressed to each beneficiary you select after clicking the button.



When you create a new letter template, its template type is copied from the source template. For example, if you choose the *Crummey Notice [EW sample]* in the **Select a template** field and then choose **Use as source for new template** as the action, your new template will be a Select Contacts type letter. If you select the *Client Gift Reminder [EW Sample]* as the source template, your new letter template will be a Standard type. Refer to a case's Reports & Docs tab to determine the template type of each source template.

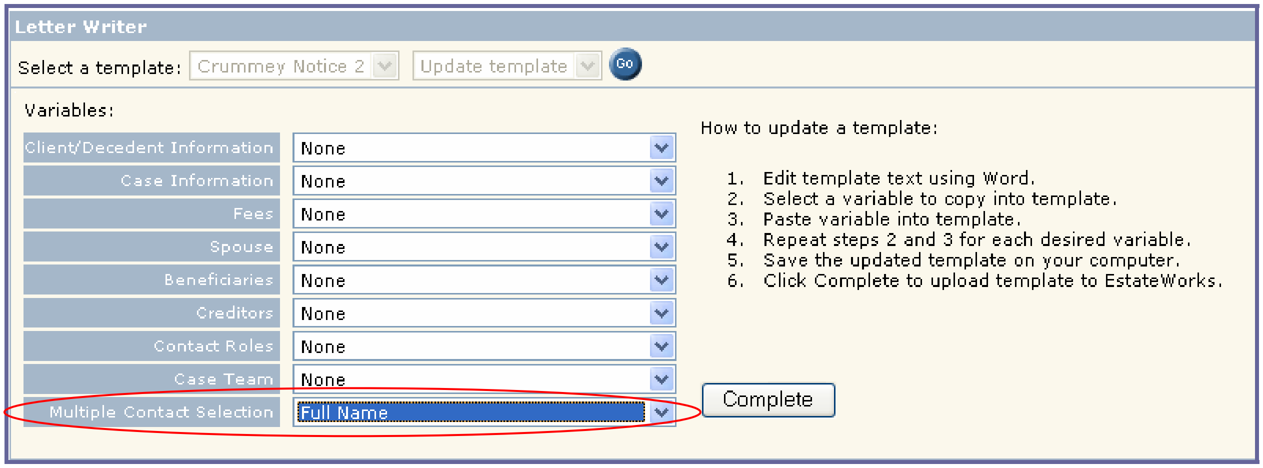
Two features of **Select Contacts templates** enable the production of multiple copies of the letter:

- **Repeat Commands** - When you create a new template, these commands appear at the top and bottom of the template. They MUST NOT be modified or deleted or the letter will not function properly.

  Top of template: «REPEAT Contact Information»

  Bottom of template: «IF COUNTER < COUNT(Contact Information)»
  «END IF»
  «END REPEAT»

- **Multi-Contact Variables** - The contact variables to be merged into the multi-letter templates must be selected from the Multiple Contact Selection drop list. For more on template variables, see ***Using Variables in a Template*** below.

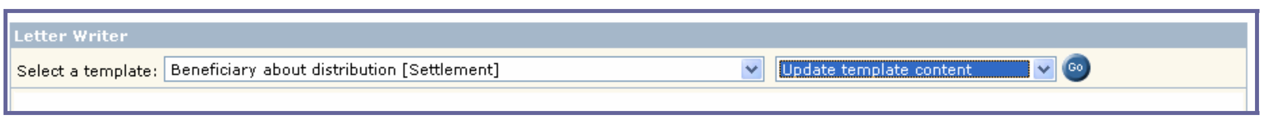


For example, the name and address variables from the *Crummey Notice* sample letter appear in the template as follows. Using variables with the ClientContact prefix ensures that each letter generated from the template has the appropriate contact information.

«ClientContactFullName»
«ClientContactAddress»
«ClientContactCityStateZip»

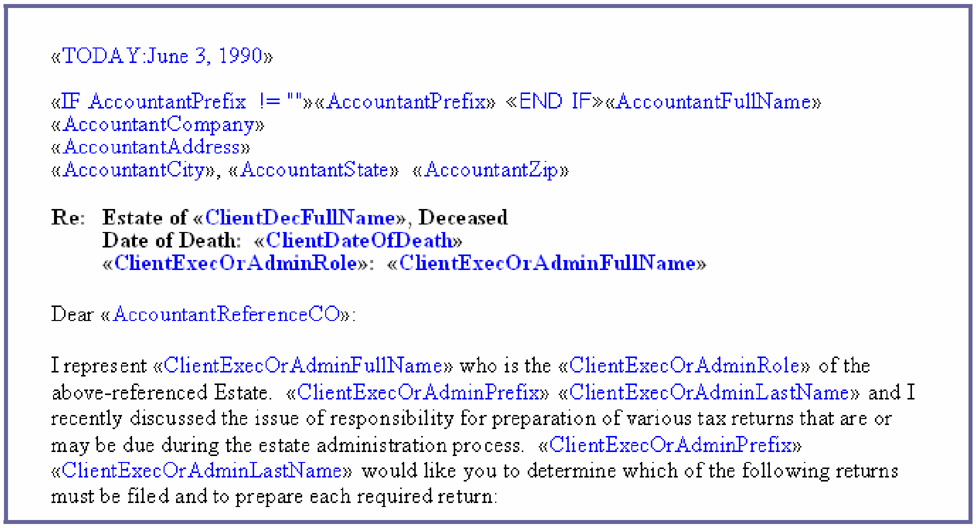
Updating Template Content

1. To modify a saved template, select it from the **Select a template** drop down list, select **Update template content** in the Action drop down box and click **Go**.



2. The template displays in a new window as a Microsoft® Word document. You can edit any of the template text just as you would any other Word document. Or you can copy and paste the body of the letter or document from another saved .doc or .rtf file.

   To open the document in Word, click on the “Edit with Microsoft Office Word” icon in the browser toolbar.


«TODAY:June 3, 1990»

«IF AccountantPrefix != ""»«AccountantPrefix» «END IF»«AccountantFullName»
«AccountantCompany»
«AccountantAddress»
«AccountantCity», «AccountantState» «AccountantZip»

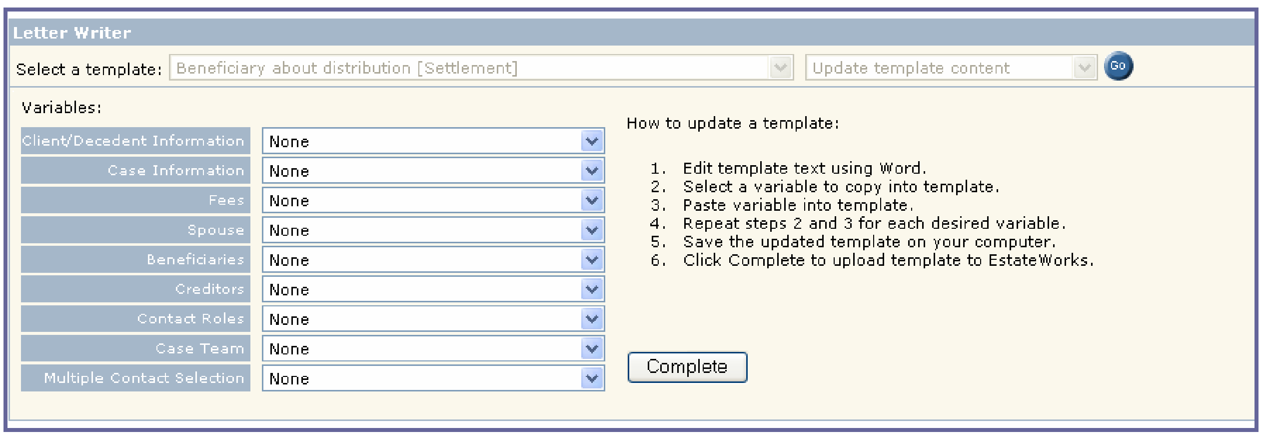
Re: Estate of «ClientDecFullName», Deceased
Date of Death: «ClientDateOfDeath»
«ClientExecOrAdminRole»: «ClientExecOrAdminFullName»

Dear «AccountantReferenceCO»:

I represent «ClientExecOrAdminFullName» who is the «ClientExecOrAdminRole» of the above-referenced Estate. «ClientExecOrAdminPrefix» «ClientExecOrAdminLastName» and I recently discussed the issue of responsibility for preparation of various tax returns that are or may be due during the estate administration process. «ClientExecOrAdminPrefix» «ClientExecOrAdminLastName» would like you to determine which of the following returns must be filed and to prepare each required return:

3. The EstateWorks window displays a list of variables that can be added to the template. These variables will be populated by case data that has been entered into EstateWorks when the document or letter is run on a selected case.

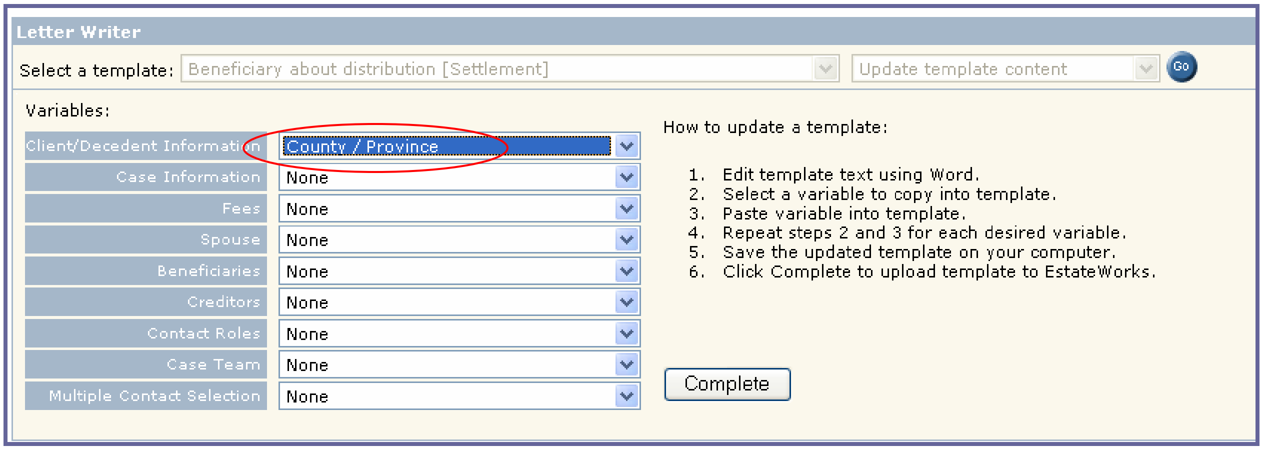
4. You can add variables, delete variables or rearrange variables within the document.



Using Variables in a Template

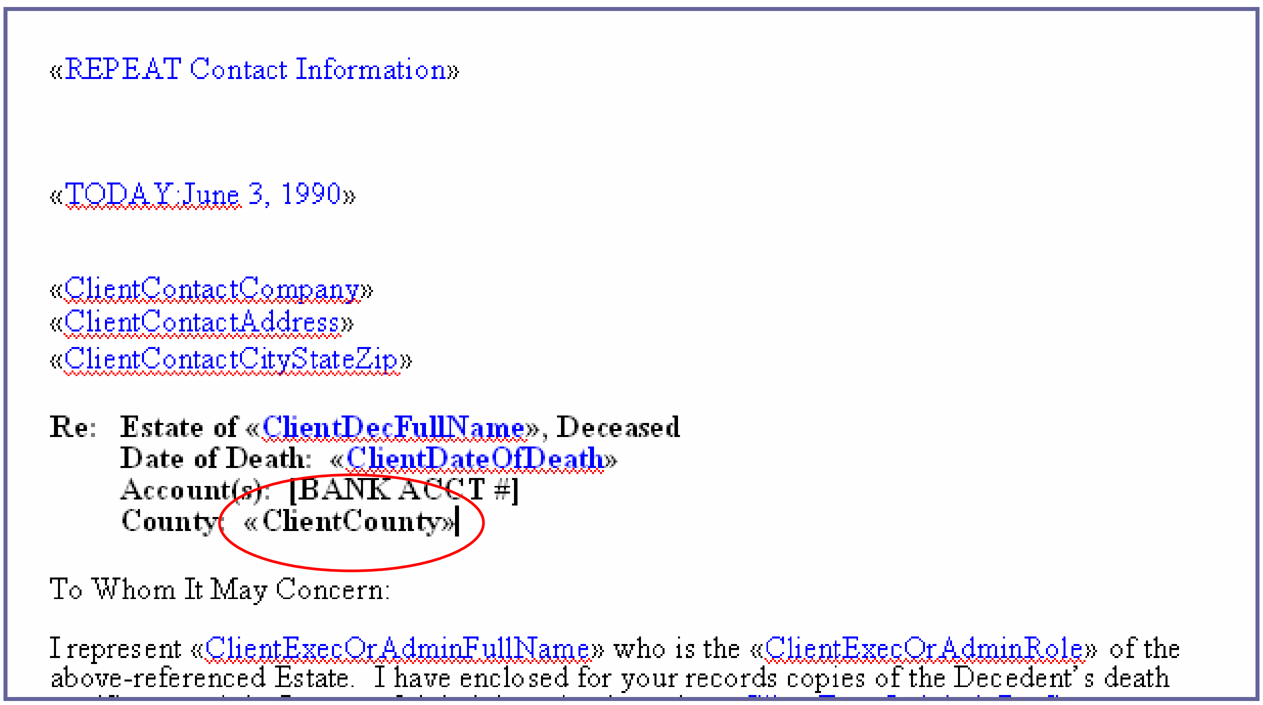
1. To add a variable to the template, select the variable to insert from the appropriate category by using the drop down list. All EstateWorks fields are represented in the drop down lists. You can copy only one variable at a time into the template.

2. **Select** the variable to use by clicking on the description in the drop down list. Selecting it copies it to your clipboard.



3. **Open or click in** the window containing the template.

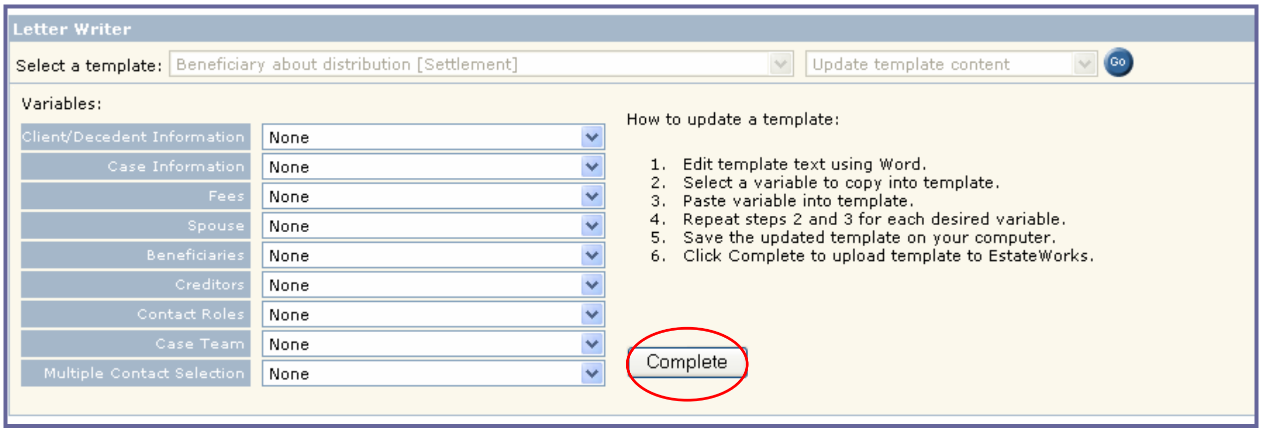
4. To insert the variable into the document, position the cursor where the variable is to be inserted and select **PASTE** or use the Windows keyboard shortcut **CONTROL+V**. The variable is inserted between special characters, **<<variable name>>,** which indicate that data is to be merged into that position.



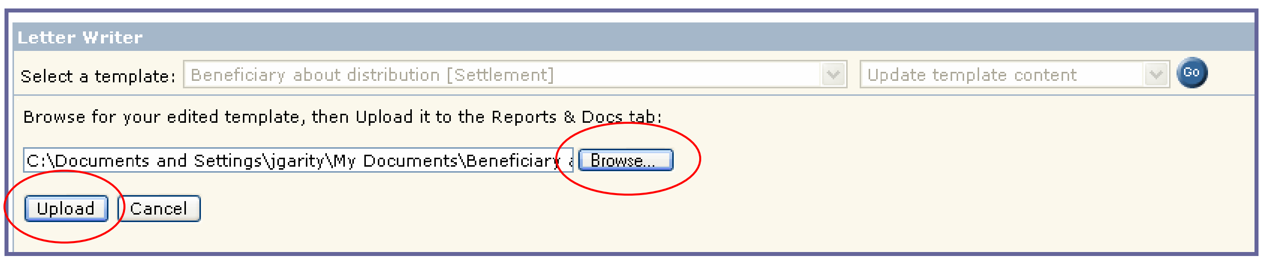
5. Once all modifications are made to the template, use **File>Save As** to save the document template to a location on your computer.

NOTE: You must save the document using the unique file name that you assigned to the template when it was first created. If you change the file name when saving in Word, changes will not upload to EstateWorks. The file type must be saved as Rich Text Format (rtf).

6. The modified template must then be uploaded to Letter Writer to replace the current file and be available on the Reports & Docs tab of the application. To upload the modified template, click the **Complete** button.



7. Use **Browse** to select the file from the location you saved it on your computer. The file name populates the text field.

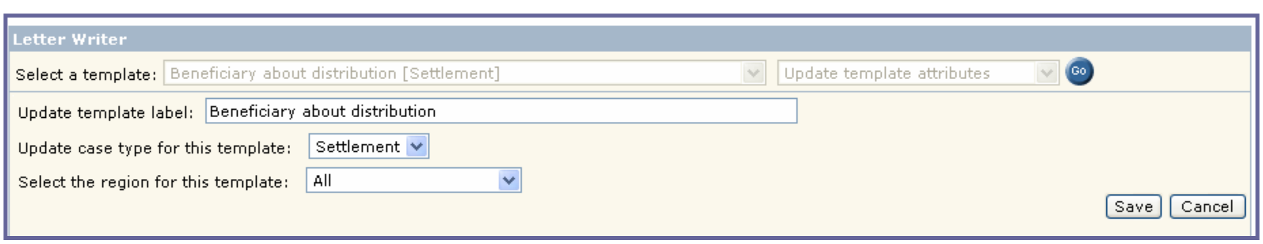


8. Click **Upload**.

9. The page returns to the **Select a template** page. You can choose another template to modify.

Changing Template Attributes

You can modify certain attributes of a customized template including the label, case types or region (if applicable) for which it displays. To change an attribute, select the template in the **Select a template** field and then choose **Update template attributes** in the Action drop down list.



Type the new label, select a new case type or region and click **Save**.

Deleting a Template

You can delete a template by selecting it in the **Select a template** field and choosing **Delete template** in the Action drop down list. You will be prompted to confirm your selection. Click **OK** to delete the template or **Cancel** to modify your request.

The template no longer appears in the list of available templates in Letter Writer or on a case's Reports & Docs tab.

Note: You cannot delete EstateWorks sample templates because they are required as source templates when creating new ones. However, you can request that these samples do not appear as selections on a case's Reports & Docs tab once you have created your own customized templates. Contact Customer Support to hide the EW template samples.