

## Customizing documents in CCH Entities Trusts – Inserting Data Fields

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Follow these steps to create a new document template in Trusts.

There are 2 types of merge field you may want to use:

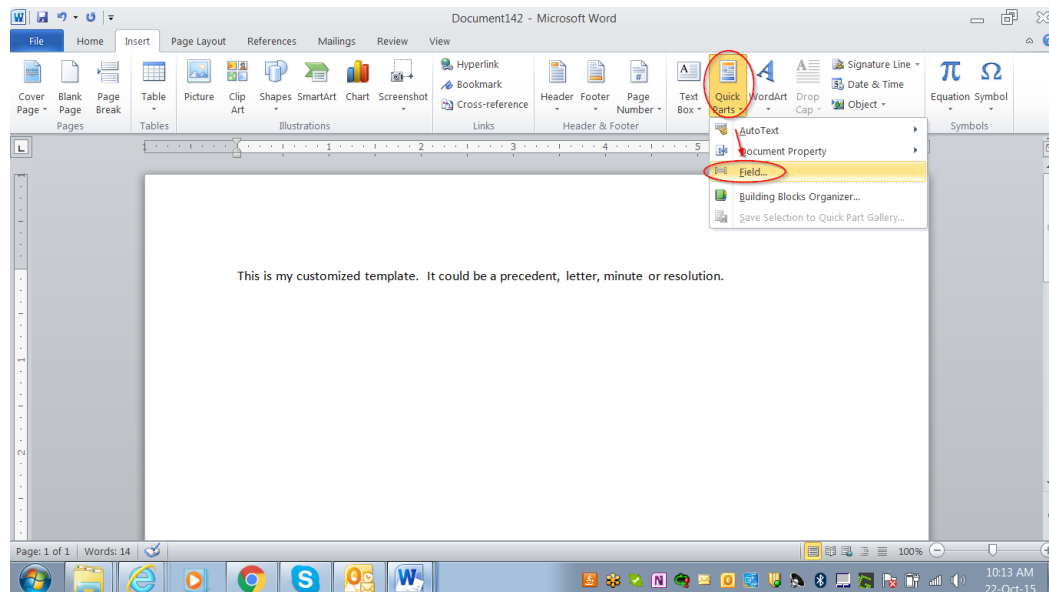
1. Standard merge field: Imports a set value, for example, Trust Name.
2. User Defined merge field: Gives the user a choice when a document is created, for example, inserting a name from a list of people.

### Standard Merge Fields

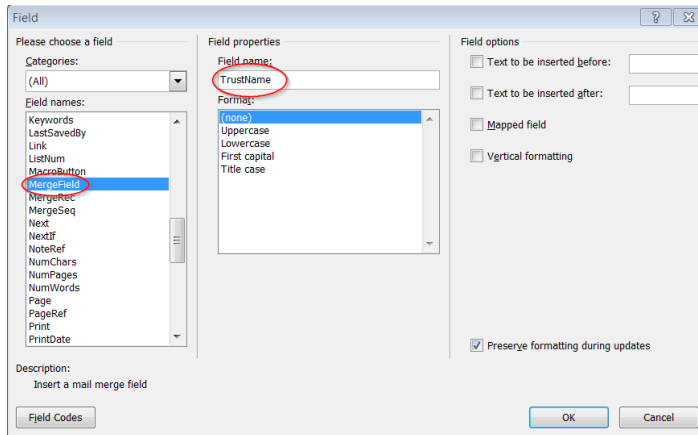
1. Create your template in **Word** leaving spaces where data is to be inserted.

Go to the first place in the document where you want to add a merge field.

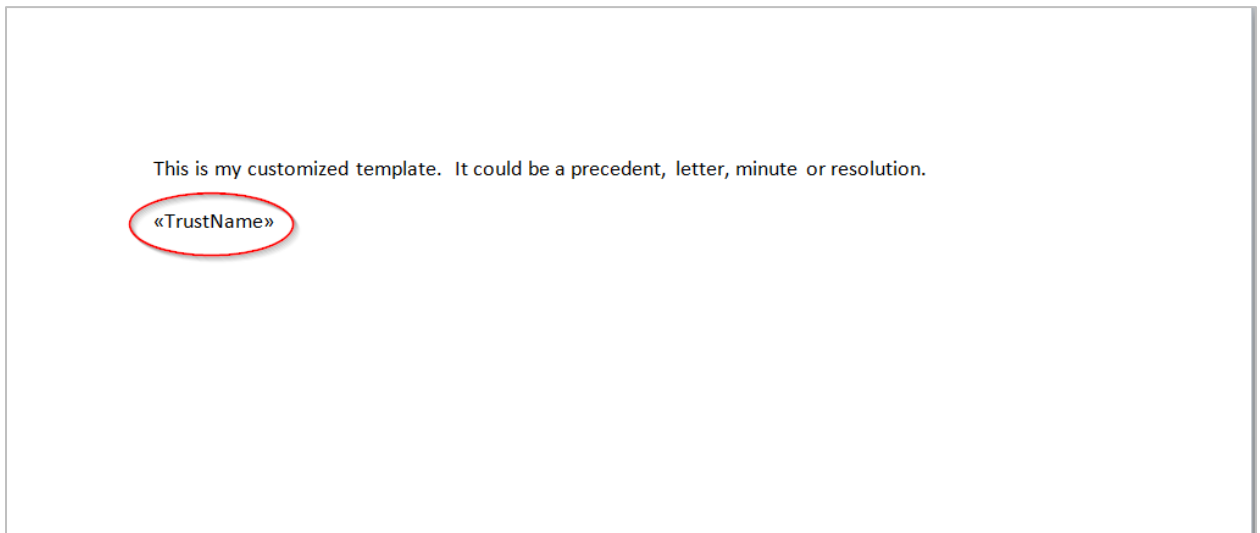
Select **Quick Parts** and **Field**.



2. Select **MergeField** and **name** the field as per the list found on page 10.



3. When this document is created in Trusts the relevant data will appear in the document automatically, in this example the trust name.

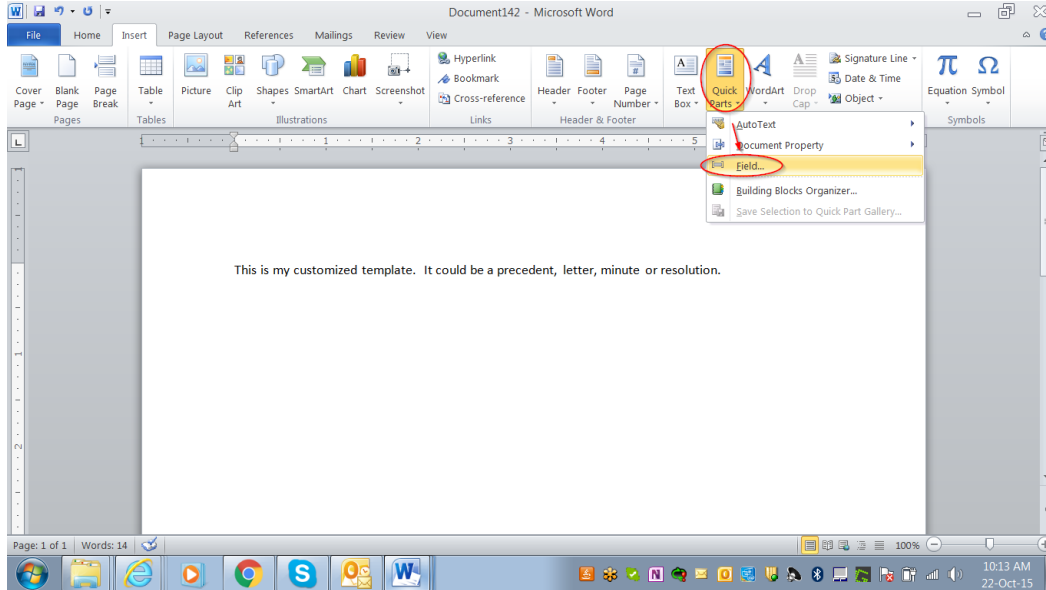


A full list of all the standard merge fields can be found in this document, starting from page 10.

4. If you do not require any User Defined fields in your document go straight to page 4, Steps 1 – 3 only.

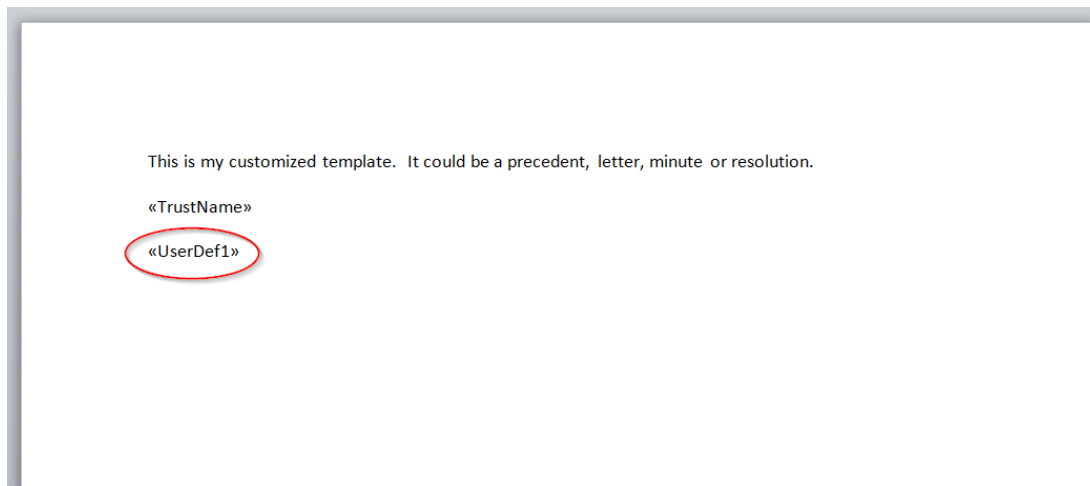
## User Defined Merge Fields

1. Create your template in **Word**. Go to the first place in the document where you want to add a User Defined merge field. Select **Quick Parts** and **Field**.



2. Select **MergeField** and name the field **UserDef1**.

Name each subsequent UserDefined field with the next number, UserDef2, UserDef3, etc. You do not specify what data you want to add in each merge field until the document is uploaded to the Trust software.



## Adding your document to the Trust master template list

1. Go to **Setup**, then select **Master Templates**.

The screenshot shows the CCH iTrust Setup menu. The 'Setup' menu item is circled in red. Under the 'Templates' sub-menu, 'Master Templates' is also circled in red. Other visible options include Users, Entry Types, and various Setup categories like Trust Groups, Trust Status, and Dynamic Trust Data.

2. Select **New**.

The screenshot shows the Master Template Listing page. The 'New' button is circled in red. The page displays a table of templates with columns for Type, Sort Code, Keycode, Name, and Created. A 'Back to Setup' button is visible on the left side.

Type	Sort Code	Keycode	Name	Created
Precedent	1	DECL01	Declaration of Trust - one principal family member	26/05/2015
Precedent	2	DECL02	Declaration of Trust - two principal family members	26/05/2015
Precedent	3	DEED01	Deed of Trust - single settlor	26/05/2015
Precedent	4	DEED02	Deed of Trust - husband and wife as settlors	02/06/2015
Precedent	5	DEED03	Deed of Trust - single settlor and two family members	02/06/2015
Gifting	6	DEED04	Deed of Sale and Purchase and Acknowledgement of Debt	27/05/2015
Gifting	7	DEED05	Deed of Acknowledgement of Debt	27/05/2015
Gifting	8	DEED06	Deed of Reduction of Debt - 1st gift to Trustee	02/06/2015
Gifting	9	DEED07	Deed of Reduction of Debt - subsequent gift to trustees	02/06/2015
Gifting	10	DEED08	Deed of Reduction of Debt - gift to trustees (\$ outstanding only certain on balance date)	02/06/2015
Gifting	11	DEED09	Deed of Release of Trustees	02/06/2015
Gifting	12	DEED10	Deed of Reduction of Debt - first gift to individual	02/06/2015
Gifting	13	DEED11	Deed of Reduction of Debt - subsequent gift to individual	03/06/2015
Gifting	14	DEED12	Deed of Release to Individual	03/06/2015

- Name the document, add a Keycode, add a Sort Order (this will control where your document appears in the list) and finally upload your Word document.

- If there are no User Defined merge fields the process is complete, otherwise continue to Step 5.
- Select **Merge Fields**, then **Add**.

6. Add the type of information you would like to select when creating this document with your trust data.

Merge Field ?

Merge Field: USERDEF1

Description:

Option Type: Please Select  Add Manager Names  Add User Names

Options:   Setup

Gifting Options:  

Required Field

Notes:

Save
Cancel

In this example we are selecting from a list of full names. This will show the full names of everyone linked to the trust.

Merge Field ?

Merge Field: USERDEF1

Description: Select the name(s) of the person(s) who is living at the property

Option Type: People Full Name  Add Manager Names  Add User Names

Options:   Setup

Gifting Options:  

Required Field

Notes:

Save
Cancel

Some of the other options include first names, addresses, dates or memo (where the user can type a whole paragraph of information). Leave the **Option Type** blank for a simple, short 'free type' field when the document is created.

Merge Field

Merge Field: USERDEF1

Description: Select the name(s) of the person(s) who is living at the property

Option Type: People Full Name (dropdown open)

- People Full Name
- Please Select
- People First Name
- People Address
- Memo
- Date

Options: Setup

Gifting Options: Required Field

Notes: [Text Area]

Buttons: Save, Cancel

If you select **Options / Setup** you can configure a list that a user can select from when creating the document.

Merge Field

Merge Field: USERDEF1

Description: Select the name(s) of the person(s) who is living at the property

Option Type: People Full Name

Options: [Dropdown] Setup

Gifting Options: [Dropdown]

Required Field:

Notes: [Text Area]

Buttons: Save, Cancel

**Droplist Setup**

Option 1	<input type="text" value="Red"/>	Option 11	<input type="text"/>
Option 2	<input type="text" value="Blue"/>	Option 12	<input type="text"/>
Option 3	<input type="text" value="Green"/>	Option 13	<input type="text"/>
Option 4	<input type="text"/>	Option 14	<input type="text"/>
Option 5	<input type="text"/>	Option 15	<input type="text"/>
Option 6	<input type="text"/>	Option 16	<input type="text"/>
Option 7	<input type="text"/>	Option 17	<input type="text"/>
Option 8	<input type="text"/>	Option 18	<input type="text"/>
Option 9	<input type="text"/>	Option 19	<input type="text"/>
Option 10	<input type="text"/>	Option 20	<input type="text"/>

**Merge Field** ?

Merge Field:

Description:

Option Type:   Add Manager Names  Add User Names

Options:

Gifting Options:

Required Field

Notes:

### Note on Required Field

If you select 'Required Field' the user must fill in the information when creating the document. This prevents users from missing important information during document creation.



7. Repeat this process for all User Defined merge fields and then **Save**.

CCH iTrust Wolters Kluwer

Thursday, October 22, 2015

Master Template Merge Fields My Own Document CCH Demo System With Data - Karen Rogers

General

Merge Fields

Merge Field	Merge Field Name	
USERDEF1	Select the name(s) of the person(s) who is living at the property	Add
USERDEF2	Select the clients favorite colour	Modify
		Delete

Notes

Print Summary

**Save** Cancel

8. Your document will now be ready to use in Trusts

CCH iTrust Wolters Kluwer

Dashboard Reports Setup Logout Thursday, October 22, 2015

Master Template Listing CCH Demo System With Data - Karen Rogers

New

Modify

Delete

Copy

Print Summary

Back to Setup

Type	Sort Code	Keycode	Name	Created
Precedent	34	DEED31	Deed of Resettlement - specific property	09/06/2015
Precedent	35	DEED32	Deed of Resettlement and Novation - specific property	09/06/2015
Precedent	36	DEED33	Deed of Resettlement - entire fund and wind up	09/06/2015
Letter	36	Letter 51	My Own Document	22/10/2015
Precedent	37	DEED34	Deed of Resettlement and Novation - entire fund and wind up	09/06/2015
Precedent	38	DEED35	Deed Bringing Forward Vesting Date	09/06/2015
Precedent	39	DECL03	Declaration of Solvency on Transfer of Property by Way of Gift to Trust	10/06/2015
Precedent	40	DECL04	Declaration of Solvency on Forgiveness of Debt	10/06/2015
Precedent	41	CERT01	Certificate of solvency	10/06/2015
Precedent	42	MEMO01	Memorandum of Guidance for Trustees - two settlors	02/06/2015
Precedent	43	MEMO02	Memorandum of Guidance for Trustees - one settlor	04/06/2015
Precedent	44	RELA01	Relationship Property Agreement - tenancy in common/joint tenancy	04/06/2015
Precedent	45	RELA02	Relationship Property Agreement - specific property to one partner/spouse	04/06/2015
Precedent	46	RELA03	Relationship Property Agreement - covering election on death and trusts	04/06/2015
Precedent	47	WILL01a	Will - individuals as executors	02/06/2015
Precedent	48	WILL01b	Will - legal firm as executor	02/06/2015
Minute	49	MINU01	Minute - minute builder	10/06/2015
Minute	50	MINU02	Minute - draft format	10/06/2015
Minute	51	MINU03	Minutes - first meeting of trustees	23/07/2015

- Finally, if you scroll to the right on the master template list you will see the option to make a document **inactive**. You may want to make the standard version of the document inactive, by checking the box, to ensure your version is always used.

Master Template Listing CCH Demo System With Data - Karen Rogers

New
All Templates ▾
All Groups ▾
Template Search 
Reset

Sort Code	Keycode	Name	Created	Inactive
1	DECL01	Declaration of Trust - one principal family member	26/05/2015	<input type="checkbox"/>
2	DECL02	Declaration of Trust - two principal family members	26/05/2015	<input type="checkbox"/>
3	DEED01	Deed of Trust - single settlor	26/05/2015	<input type="checkbox"/>
4	DEED02	Deed of Trust - husband and wife as settlors	02/06/2015	<input type="checkbox"/>
5	DEED03	Deed of Trust - single settlor and two family members	02/06/2015	<input type="checkbox"/>
6	DEED04	Deed of Sale and Purchase and Acknowledgement of Debt	27/05/2015	<input type="checkbox"/>
7	DEED05	Deed of Acknowledgement of Debt	27/05/2015	<input type="checkbox"/>
8	DEED06	Deed of Reduction of Debt - 1st gift to Trustee	02/06/2015	<input type="checkbox"/>
9	DEED07	Deed of Reduction of Debt - subsequent gift to trustees	02/06/2015	<input type="checkbox"/>
10	DEED08	Deed of Reduction of Debt - gift to trustees (\$ outstanding only certain on balance date)	02/06/2015	<input type="checkbox"/>
11	DEED09	Deed of Release of Trustees	02/06/2015	<input type="checkbox"/>
12	DEED10	Deed of Reduction of Debt - first gift to individual	02/06/2015	<input type="checkbox"/>
13	DEED11	Deed of Reduction of Debt - subsequent gift to individual	03/06/2015	<input type="checkbox"/>
14	DEED12	Deed of Release to Individual	03/06/2015	<input type="checkbox"/>
15	DEED13	Deed of Gift of Property (other than debt)	11/06/2015	<input type="checkbox"/>
16	DEED14	Deed of Gift Subject to Mortgage	11/06/2015	<input type="checkbox"/>
17	DEED15	Deed of Release of Debt by Way of Gift	11/06/2015	<input type="checkbox"/>
18	DEED16a	Deed of Release of Debt by Way of Gift with Options for Future Payments (loan)	11/06/2015	<input type="checkbox"/>
19	DEED16b	Deed of Release of Debt by Way of Gift with Options for Future Payments (gift)	11/06/2015	<input type="checkbox"/>
20	DEED17	Deed of Appointment of Additional Trustee - no retirement	04/06/2015	<input type="checkbox"/>

Modify

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Delete

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Copy

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Print Summary

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Back to Setup

**Trust Standard Data Fields**


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**All Firm Bookmarks**

Firm Name	«FirmName»
Firm Address 1	«FirmAdd1»
Firm Address 2	«FirmAdd2»
Firm Address 3	«FirmAdd3»
Firm Phone 1	«FirmPhone»
Firm Phone 2	«FirmPhone2»
Firm Email	«FirmEmail»

**All Trust Bookmarks**

Trust Name	«TrustName»
Formation Date	«FormDate»
Trust Reference	«Reference»
Trust Type	«TrustType»
Manager	«Manager»
Trust Status	«TrustStat»
Trust Category	«TrustCat»
Trust Group	«TrustGrp»
Vesting Date	«VestDate»
Vesting Note	«VestNote»
Balance Date	«BalDate»
IRD Number	«TrustIRD»
Bank Name 1	«BankName1»
Bank Name 2	«BankName2»
Branch Name 1	«BankBr1»
Branch Name 2	«BankBr2»
Signatories 1	«Signat1»
Signatories 2	«Signat2»
Account No 1	«AccNo1»
Account No 2	«AccNo2»
Controlled Bank Account Notes	«CbaNote»
Fees	«Fees»
File Location	«FileLoc»
Document Reference	«DocRef»
Trust Notes	«TrustNote»
Legal Summary 1	«LegalSum1»
Legal Summary 2	«LegalSum2»
Legal Summary 3	«LegalSum3»
Legal Summary 4	«LegalSum4»
Legal Summary 5	«LegalSum5»
Trust Custom Field 1	«TrustUser1»

Trust Custom Field 2	«TrustUser2»
Trust Custom Field 3	«TrustUser3»
Trust Custom Field 4	«TrustUser4»
Trust Custom Field 5	«TrustUser5»
Trust Custom Field 6	«TrustUser6»
Trust Custom Field 7	«TrustUser7»
Trust Custom Field 8	«TrustUser8»
Trust Custom Field 9	«TrustUser9»
Trust Custom Field 10	«TrustUser10»
Trustee Table	«TteeList»
All Trustees	«TteeAll»
Beneficiary Table	«BeneList»
All Beneficiaries	«BeneAll»
Settlor Table	«SettList»
All Settlers	«SettAll»
Client Table	«ClientList»
All Clients	«ClientAll»
Accountant Full Name	«AccFull»
Beneficiary 1 Full Name	«Bene1Full»
Beneficiary 1 Address Line 1	«Bene1Add1»
Beneficiary 1 Address Line 2	«Bene1Add2»
Beneficiary 1 Address Line 3	«Bene1Add3»
Beneficiary 1 Address Line 4	«Bene1Add4»
Beneficiary 1 Phone Number	«Bene1Phone»
Beneficiary 1 Occupation	«Bene1Occ»
Beneficiary 1 First Name	«Bene1FName»
....	....
Beneficiary 5 Full Name	«Bene5Full»
Beneficiary 5 Address Line 1	«Bene5Add1»
Beneficiary 5 Address Line 2	«Bene5Add2»
Beneficiary 5 Address Line 3	«Bene5Add3»
Beneficiary 5 Address Line 4	«Bene5Add4»
Beneficiary 5 Phone Number	«Bene5Phone»
Beneficiary 5 Occupation	«Bene5Occ»
Beneficiary 5 First Name	«Bene5FName»
Settlor 1 Full Name	«Sett1Full»
Settlor 1 Address Line 1	«Sett1Add1»
Settlor 1 Address Line 2	«Sett1Add2»
Settlor 1 Address Line 3	«Sett1Add3»
Settlor 1 Address Line 4	«Sett1Add4»
Settlor 1 Phone Number	«Sett1Phone»
Settlor 1 Occupation	«Sett1Occ»
Settlor 1 First Name	«Sett1FName»
....	....

Settlor 5 Full Name	«Sett5Full»
Settlor 5 Address Line 1	«Sett5Add1»
Settlor 5 Address Line 2	«Sett5Add2»
Settlor 5 Address Line 3	«Sett5Add3»
Settlor 5 Address Line 4	«Sett5Add4»
Settlor 5 Phone Number	«Sett5Phone»
Settlor 5 Occupation	«Sett5Occ»
Settlor 5 First Name	«Sett5FName»
Trustee 1 Full Name	«Ttee1Full»
Trustee 1 Address Line 1	«Ttee1Add1»
Trustee 1 Address Line 2	«Ttee1Add2»
Trustee 1 Address Line 3	«Ttee1Add3»
Trustee 1 Address Line 4	«Ttee1Add4»
Trustee 1 Phone Number	«Ttee1Phone»
Trustee 1 Occupation	«Ttee1Occ»
Trustee 1 First Name	«Ttee1FName»
....	....
Trustee 5 Full Name	«Ttee5Full»
Trustee 5 Address Line 1	«Ttee5Add1»
Trustee 5 Address Line 2	«Ttee5Add2»
Trustee 5 Address Line 3	«Ttee5Add3»
Trustee 5 Address Line 4	«Ttee5Add4»
Trustee 5 Phone Number	«Ttee5Phone»
Trustee 5 Occupation	«Ttee5Occ»
Trustee 5 First Name	«Ttee5FName»
Custom Field 1	«UserDef1»
Custom Field 2	«UserDef2»
Custom Field 3	«UserDef3»
....	....
Custom Field 50	«UserDef50»
<b>Trustee Signatures</b>	<b>&lt;&lt;TteeSign&gt;&gt;</b>
<b>Trustee Company Signatures</b>	<b>&lt;&lt;TteeCoSign&gt;&gt;</b>
<b>Settlor Signatures</b>	<b>&lt;&lt;SettSign&gt;&gt;</b>
<b>Minutes</b>	<b>&lt;&lt;Minutes&gt;&gt;</b>

**All Minute Specific Bookmarks**

Minute Subject	«MinuteSubject»
Minute	«Minute»

**All Signature Specific Bookmarks**

Full Name	«FullName»
First Name	«FirstName»
Last Name	«LastName»
Given Name	«GivenName»
Occupation	«Occupation»
Postal Address 1	«Add1»
Postal Address 2	«Add2»
Postal Address 3	«Add3»
Postal Address 4	«Add4»
Phone	«Phone»
Firm Name	«Firm»
Date of Birth	«Dob»
Signature Type	«SignType»

**All Person Specific Bookmarks**

Full Name	«FullName»
First Name	«FirstName»
Last Name	«LastName»
Title	«Title»
Postal Address 1	«PostalAdd1»
Postal Address 2	«PostalAdd2»
Postal Address 3	«PostalAdd3»
Postal Address 4	«PostalAdd4»
Postal Code	«PostalZip»