

Templates Settings

As the software pre-populates documents, certificates, emails and client checklists there are selection of default templates which will be automatically used when you start using the software. These templates can either be left as default or you can create your own costume templates. To customise your templates go to:

My Office > Templates

This will take you to the template settings page. The table displays all of the available templates. When you first visit the template page you will notice that all of the templates will be set to default (or in the case of logos be set to “none”). Depending on which template you want to customise you will be given different options, depending on the file type.

Customising “Form” Templates

The templates that are in “form” file format are:

- Client Checklist
- Online Client Checklist Email Text
- PDF Client Checklist

To customise a form file simply click on the green pencil on the left hand side of the template name. Now you're on the specific template settings that you want to work on you have a few options. The drop down menu bar in the center of the screen allows you to switch between the default template and any template you have created. To customise your template click “**Edit Wording**”. This will allow you to view and edit the template that has been selected in the drop down menu bar, if it is your first time editing a template you will be working off the default template (please not that if you edit the default template it will create a new template, so you will always able to revert to the default template if needed). From here you can enter a name for the template and any notes you may want and then start editing the text.

It is important to remember to keep the keywords throughout the wording, the keywords allows the software to switch out the certain words for the relevant word for each client you use the template for, this includes the client name, their company name, key dates and addresses. The keywords always end with the letter X e.g. DATEX. You can find the keywords in the lightbulb at the top of the specific template screen.

After you have made your changes click **Save**. (The software will automatically assign your new template as default unless you untick the “Assign this file as your default” which is located below the Notes box.)

Customising PDF Templates

The templates that are in PDF format are :

- Share Certificates
- Dividend Vouchers

For these templates you will need to upload your new template. To do this click on the green pencil to the left of the template and then click **ADD**.

From the upload page click the **Choose File** button. A new window will appear allowing you to select the file you would like to upload from your computer. After you have selected a file add a description in the Notes and click **Upload**.

Edit Fields

After you have uploaded your PDF template you will need to edit the fields. Editing fields tells the software where you want certain information to land on the page. For example, on a share certificate where it says "Certificate Number" you need to tell the software to enter the certificate number just to the right of the word.

To edit a field click on the **Edit Field** button at the bottom of the page of the specific template you are working on. You will be presented with a fields table on the left and a preview of the PDF on the right hand side. Click **Add a Field**.

Here you will see a selection of options to the left of the screen and a preview of the PDF on the right with a mm marker grid enabling you to work out the position of the fields. Work down the options on the right to add a field:

- Select which field you want to work in e.g. Certificate Number.
- Enter the Horizontal position (using the grid as a guide) e.g 112mm
- Enter the Vertical position (using the grid as a guide) e.g 82mm
- Field Width (will enable long text to flow to the next line)
- Font size
- Alignment
- Effect e.g. Bold, Italic or Underlined

After all of these have been entered, click **Add**. Repeat this process with all other fields, when you are happy that all fields have been added, click **Back** to return to that particular template settings page and then click **Save** to return to the main settings table.

Customising RTF Templates

The templates that are in RTF format are :

- Final dividend by shareholders meeting
- Interim multiple dividends by directors meeting
- Interim multiple dividends by directors resolution
- Interim single dividend by directors meeting
- Interim single dividend by directors resolution
- Client checklist covering letter

For these templates you will need to upload your new template. To do this click on the green pencil to the left of the template and then click **ADD**.

From the upload page click the **Choose File** button. A new window will appear allowing you to select the file you would like to upload from your computer. After you have selected a file add a description in the Notes and click **Upload**. A confirmation screen will appear informing you that the rtf file has been uploaded, click **Continue** and then **Save**.

Customising JPEG Templates

The templates that are in JPEG format are :

- A4 logo Image (this will be displayed at the top of documents)
- Email logo image (This will appear at the top of your Emails)
- Email Footer Image (This will appear at the bottom of your Emails)

If you choose not to customise the A4 logo the default will be the name of your practice and your address at the top of documents. If you choose not to include an Email logo or footer this will be left blank. Please see an example of an A4 logo below.



For these templates you will need to upload your new template. To do this click on the green pencil to the left of the template and then click **ADD**.

From the upload page click the **Choose File** button. A new window will appear allowing you to select the file you would like to upload from your computer. After you have selected a file, add a description in the Notes and click **Upload**. A confirmation screen will appear informing you that the JPEG file has been uploaded, click **Continue** and then **Save**.