Edit Will Clauses (Button)
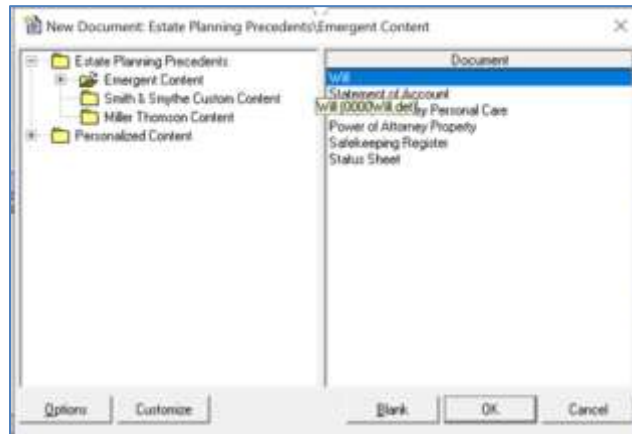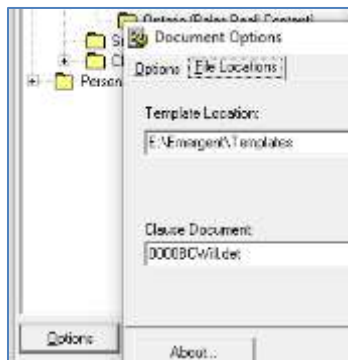
Note: This is considered ADVANCED LEVEL ability. Do NOT proceed without creating a backup of the template being edited.

To make a backup of the Template, select the name and let your mouse hover until the template name appears.


To locate the Emergent Templates Folder, click **Options**, then **File Locations** and copy the location and paste into File Explorer.

Copy the template from the Templates folder and save as a backup.

This allows changes to be made to a clause without affecting the original content provided with Emergent Estate Planning and Vault Manager. Before making any changes to this document, ensure that bookmarks and fields are visible in Microsoft Word by clicking **File > Options > Advanced > Show Document Content** and tick the **Show bookmarks** box and set the **Field Shading** dropdown to **Always**.
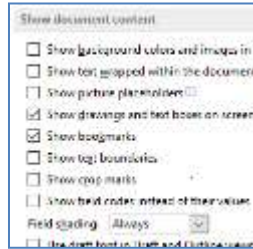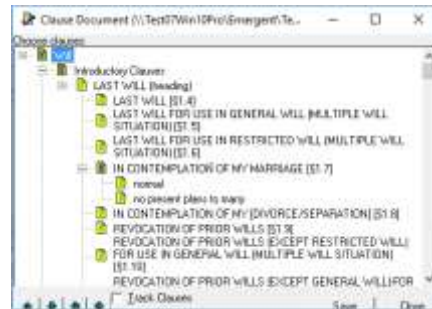
Click the **Edit Clauses** button on the Clause Chooser. You will see a version of the Clause Selector in the Emergent Estate Planning program. If the clauses appear in a "collapsed" form and showing the headings only. Right-click and choose **Expand** to see all clauses.
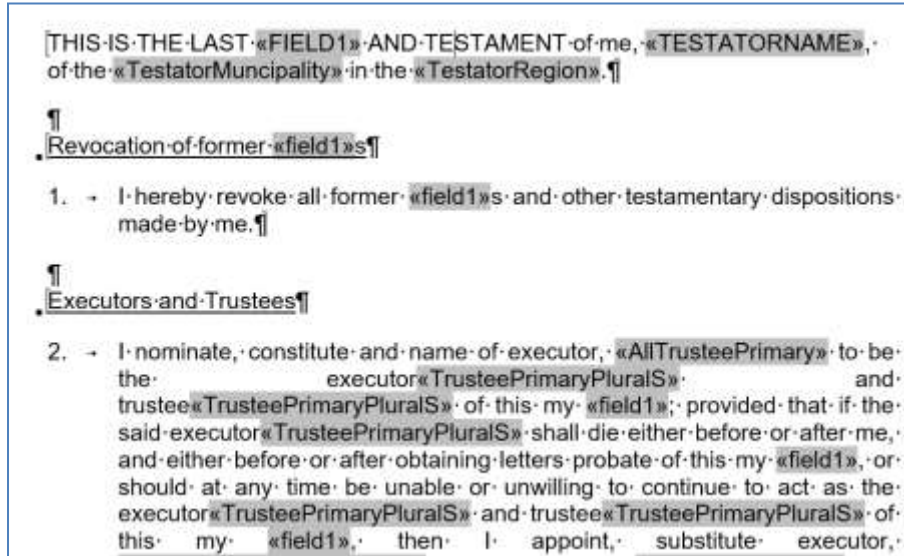

NOTE: If the Word Template appears and the Clause Selector is not visible, it may be that the Clause Selector opened first, and is behind the Word Template. Simply move the document to the side of your screen until the Clause Selector is visible, and drag both to side-by-side positions.

FURTHER NOTE: In the course of clicking between the Word Template and the Clause Selector, the Word Template may drop behind the Emergent Estate Planning screen, so click the Word icon on the toolbar to retrieve the Word Template.

Your Microsoft Word document will look similar to this:

THIS·IS·THE·LAST·«FIELD1»·AND·TESTAMENT·of·me,·«TESTATORNAME»,·
of·the·«TestatorMuncipality»·in·the·«TestatorRegion».¶

¶
Revocation·of·former·«field1»s¶

1. → I·hereby·revoke·all·former·«field1»s·and·other·testamentary·dispositions·
        made·by·me.¶

¶
Executors·and·Trustees¶

2. → I·nominate,·constitute·and·name·of·executor,·«AllTrusteePrimary»·to·be·
        the·   executor«TrusteePrimaryPluralS»·   and·
        trustee«TrusteePrimaryPluralS»·of·this·my·«field1»;·provided·that·if·the·
        said·executor«TrusteePrimaryPluralS»·shall·die·either·before·or·after·me,·
        and·either·before·or·after·obtaining·letters·probate·of·this·my·«field1»,·or·
        should·at·any·time·be·unable·or·unwilling·to·continue·to·act·as·the·
        executor«TrusteePrimaryPluralS»·and·trustee«TrusteePrimaryPluralS»·of·
        this·   my·   «field1»,·   then·   I·   appoint,·   substitute·   executor,·

Select the **Show/Hide Paragraph Marks** button on the Ribbon. This will display all paragraph, spacing, and section breaks
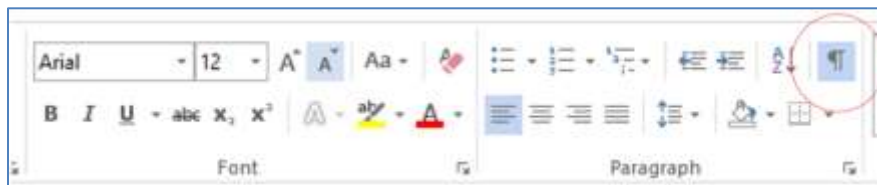
Bookmarks are the pale grey [*text*] surrounding headings or clauses. The merge fields are « *text* » that populates with the data entered into Emergent Estate Planning. Do not delete or make any changes to bookmarks or fields or the clause will not work properly. Do not make changes to any sections breaks as that will also impact the clauses.

Editing and Adding Will Clauses

Editing a Will Clause

To edit an existing clause, simply make the changes to the regular text in that clause.   Once the changes have been made, save and close the Word document, return to the Clause Selector in Emergent Estate Planning and click the **close** button.

Adding a New Will Clause

Each section of the source document is followed by "empty" lines outside of the bookmarks. If an entirely new clause is needed as an addition to existing clauses, navigate to that section and start at the next blank line.

Type or copy/paste the new clause into the document. If you are creating a version of an existing clause with slight modifications copy the required field codes into the new clause. Each section of the Source Will document deals with specifics, so merge codes copied/pasted from an existing clause into the new clause will also populate with the necessary data from Emergent Estate Planning. In the screenshot below, you can see the bookmarks created around paragraph 4, as well as the merge fields copied/pasted from paragraph 3

Next, apply the proper EMS style to the new clause. For the most part, the new clause will be "EMS Level 2 Numbering" which will apply the automatic numbering used throughout the source document. If the proper style is not applied, this will affect the document. Note that at this stage, the new clause does not have bookmarks applied.
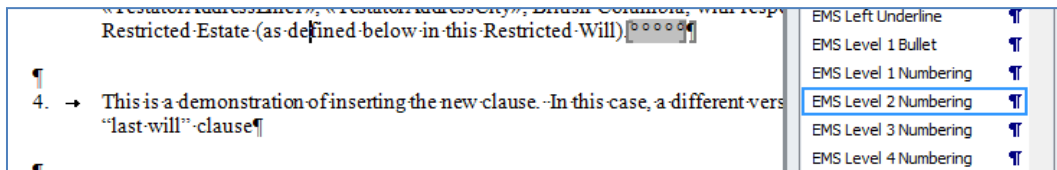

Once the style has been applied, highlight the new clause and drag to the area/section of the Clause Document Tree in Emergent Estate Planning until the heading of the section is highlighted in blue. Drop the clause on the appropriate heading. If it's easier, drop the clause on the top level "Will" heading. The drop will activate the refresh action and the Clause Selector will reappear in the collapsed view. Expand the headings to view the new clause. To change the order in the Tree, click to select the clause and use the up/down arrows at the bottom left to move the clause into position.
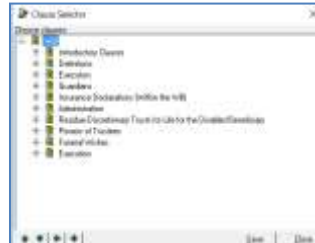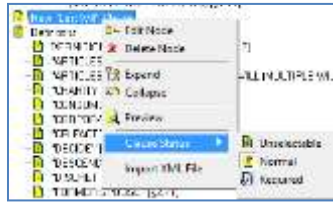

Once the new clause is added, the bookmarks will then appear around the new clause and it will be available in the Clause Chooser.

After the new clause has been added to it's section, right click and choose **Edit Node** to rename to the display name:
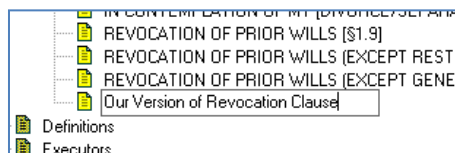
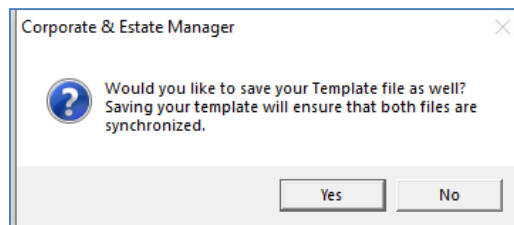and right click **Clause Status** to set whether **Required** or **Normal**

Once the clause attributes have been set, click **Save** in the Emergent Estate Planning Clause Document window.

The save screen will open automatically. Click on **Save**. **Do not rename the document**.

You will then get a prompt to save the changes to the template to sync the changes to both files. Select **Yes**.

Now click **Close** in the Clause Document window and **save and close** the Word template. **Do not rename the document**. The new clause will be available to all users immediately.

NOTE: if the XML File Association or changes to the Word Template are not saved, the changes will not take effect.

Edit Node	Allows the clause to be renamed
Delete Node	Deletes the clause from the tree. The bookmarks are removed from the clause, but the text remains. This has no effect on the Source document.
Clause Status	Sets whether the new clause is a "Normal" or selectable clause, or a Required, Mandatory clause that will be included in the center pane of the CCT
Expand/Collapse	Expands or collapses that section of the Clause Tree
Preview	Shows that particular clause in a preview window