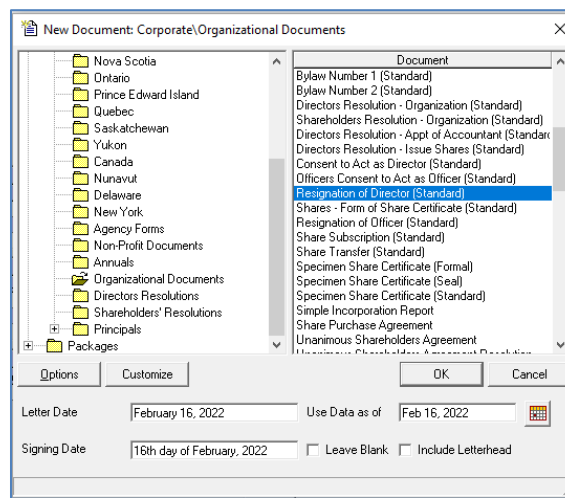


Creating Custom Templates

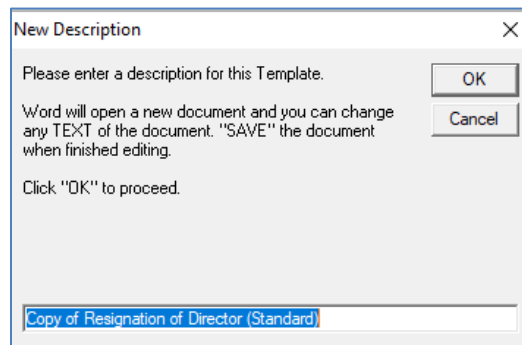
Note: Government Forms and Templates or Documents contained in Packages should NOT be edited. This procedure should only be done on minute book documents.

The quickest and most efficient way to create a new Template is to base it on an existing template. The benefit to this method rather than changing the existing Template directly is that a completely new Template is created and future updates made by Emergent to Emergent Corporate and Estates ET will not overwrite the changes made to the generic Emergent Templates.

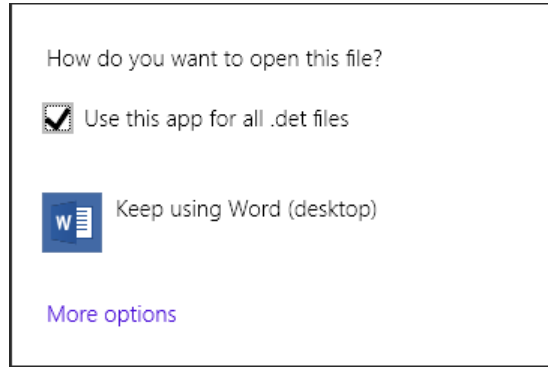
To create a custom template, start the **Create Documents** process from any matter, choose the document most like the new document you wish to create and click on the **Customize** button.



You will then be asked for a password. The default password is **Emergent01**, which will open a dialogue box asking for the name of the new document.



If you are asked, use Word to open the new document.



The new document will open automatically in word ready for customization.

Note: Be **VERY** careful not to change anything between the chevrons <<●>> as these are the merge fields that generate the information in the documents. Also, be aware that changing any section breaks may also affect the behavior of your documents. Changes should be restricted to the wording of the document only.

TO: «THECORP» (the “Corporation”)
AND TO: THE DIRECTORS THEREOF

I, the undersigned, hereby resign as the «txsOfficerTitle0» of the Corporation to take effect immediately.

DATED «LegalDate».

_____ «txtOfficerName0»

Fields

Fields are the words or phrases in the template with <<●>> surrounding them. When clicked on, a grey box appears.

«THECORP» «txtOfficerName0»

Fields can be copied, moved or formatted for styles (font, size, paragraph, etc.) but it’s important that the text of the field is not altered in any way. These are the merge fields that insert the data from the appropriate Contact Card.

Sections

IT IS VERY IMPORTANT NEVER TO REMOVE OR CHANGE THE LOCATION OF SECTION BREAKS

Section breaks control what portions of text will show or be removed on document creation. For example, if the “Audit Exempt” box is checked in Corporate Manager ET, the wording for Accountants will appear in the document instead of the wording relating to Auditors.

To remove a Custom Template from the Document List, go to **Tools > Options > Data Maintenance > Document > Document**, locate the name of the Custom Template and delete the row.

Test your Template

Once you have created your new customized document, save and close it. It is important to always test the Template after changes were made. Merge it to see the Template with the expected changes.

The newly created template will be available at the bottom of the document list in that folder and can be used in the same manner as any other template.

