



WILLS IN ONEAUTHOR

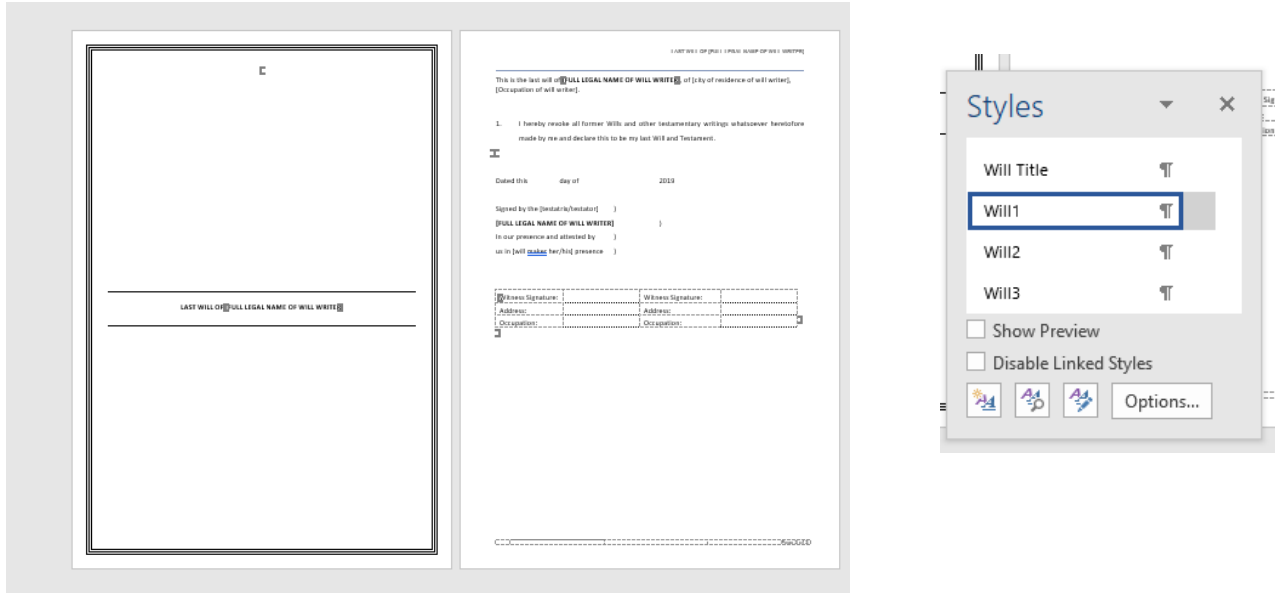
This manual will help you get the most from OneAuthor will template, so you can quickly and easily prepare important documents

- The OneLaw team

The OneAuthor will builder gives firms control of the layout and content of their wills. There are several components of the will, which we will run through in this manual.

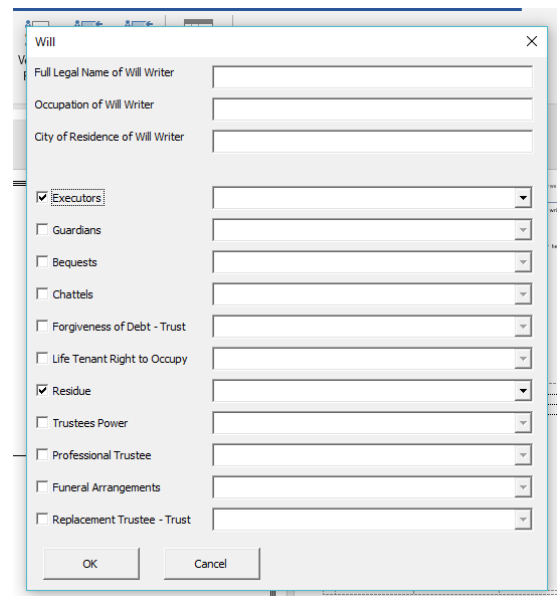
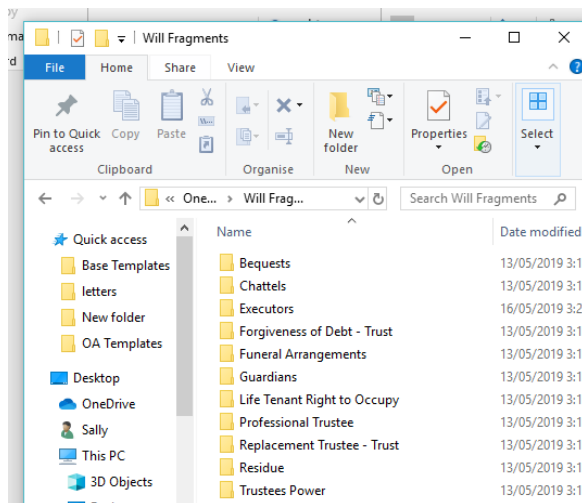
The template

The will template is formatted as your firm requires. It consists of a cover page, content page and signoffs. Your firm creates will fragments (blocks of text) to insert into the template when a will is created. Will styles make formatting the template and the will fragments consistent.



The body of the document is built with the will builder dialog box, which inserts will fragments into the document. The categories of will fragments are entirely up to your firm. You decide the categories, and the dialog box modifies to suit. You can have as many different will templates, with their own unique categories, as your firm requires.

The categories are replicated as folders stored in the OneAuthor Folder (see below – file explorer puts them in alphabetical order)



Each folder holds the fragments associated with the category. An example of a fragment for Executors could be:

1. If [my [husband/wife] [HUSBAND NAME/WIFE NAME] survives me by fourteen (14) days I give [spouse him/her] the whole of my estate after payment of debts, duties, taxes and executorship expenses and appoint [spouse him/her] my Executor but if [spouse he/she] does not survive me by fourteen (14) days the following provisions shall apply\}

This fragment is stored in the 'Executor' folder with a very clear name identifying the content of the fragment i.e. 'All to Spouse Clause.docx'.

When the user selects this fragment, it is inserted in the document. The order of the categories in the dialog box controls the order in which the fragments are inserted in the will.

The will and the fragments are formatted with styles that include 'Will Title', 'Will 1', 'Will 2' and 'Will 3'. These styles include the numbering, font, spacing and indents. The styles ensure the fragments slot into the will and match the will's format. The styles are formatted to your firms' requirements.

Creating your will and fragments

1. OneAuthor will provide you with a will template formatted to your specifications
2. The OneLaw team will set up the folder structure in line with categories supplied by your firm
3. OneAuthor will provide a will fragment template

Create a will fragment

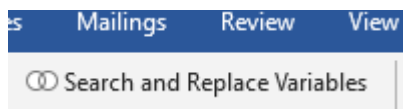
1. Use the will fragment template
2. Select the correct styles and type in the fragment, or;
Copy text into the template and apply the correct will styles
3. Put any variables in the fragments in [square brackets]. Format the variables as required
 - a. Use clear and distinct variable names i.e. [Spouse's full legal name]
 - b. Use the exact same variable for all, to ensure the variable is replaced throughout the document
 - c. Format each variable as required. Variables can have different formatting throughout the will
4. Save the fragment in the correct folder, with a clear name

The next time the will template is used, the new fragment will appear on the list of fragment options when the title is selected.

Create a will

1. Select the will template from the OneAuthor document button
2. Type in the name of the will maker, their occupation and address
3. Tick the correct category and select the correct fragment from the drop-down list
4. Repeat the above steps until you've selected all the fragments required

5. Click 'OK'
6. Use the 'Search and Replace Variables' button in the OneAuthor tool bar to replace variables in the template



7. Manage your will