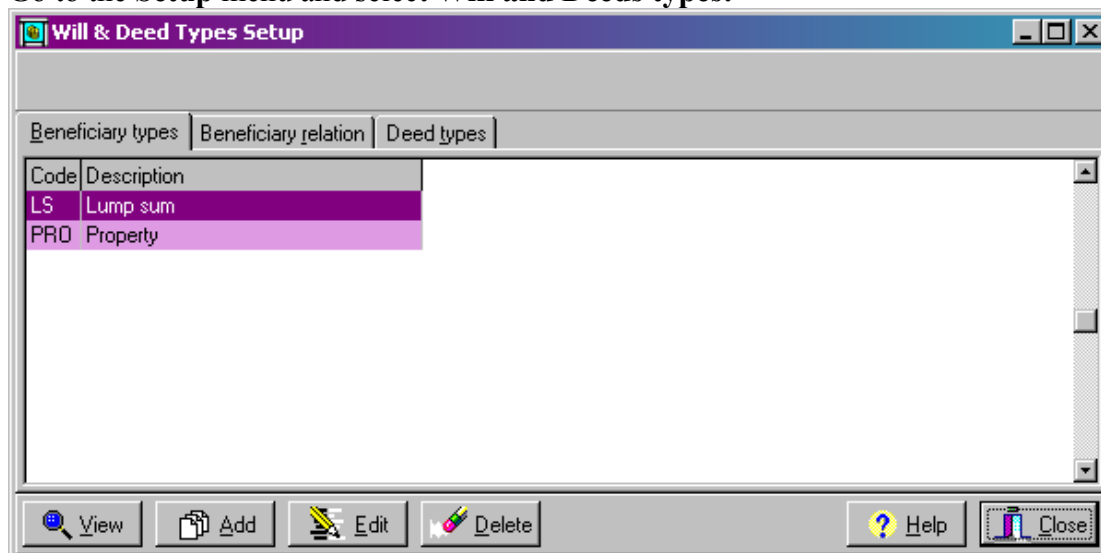


## Using the Wills and Deeds module

The Wills and Deeds module allows you to store information related to Wills and Deeds against a client.

### Setting up Wills and Deeds types

Go to the **Setup** menu and select **Will and Deeds types**:



This screen will allow you to setup:

- Beneficiary types
- Beneficiary relations
- Deed types

These will then be available for selection when you add wills and deeds to the client record.

### Adding a beneficiary type

To set up a beneficiary type, click on the **Add** button:

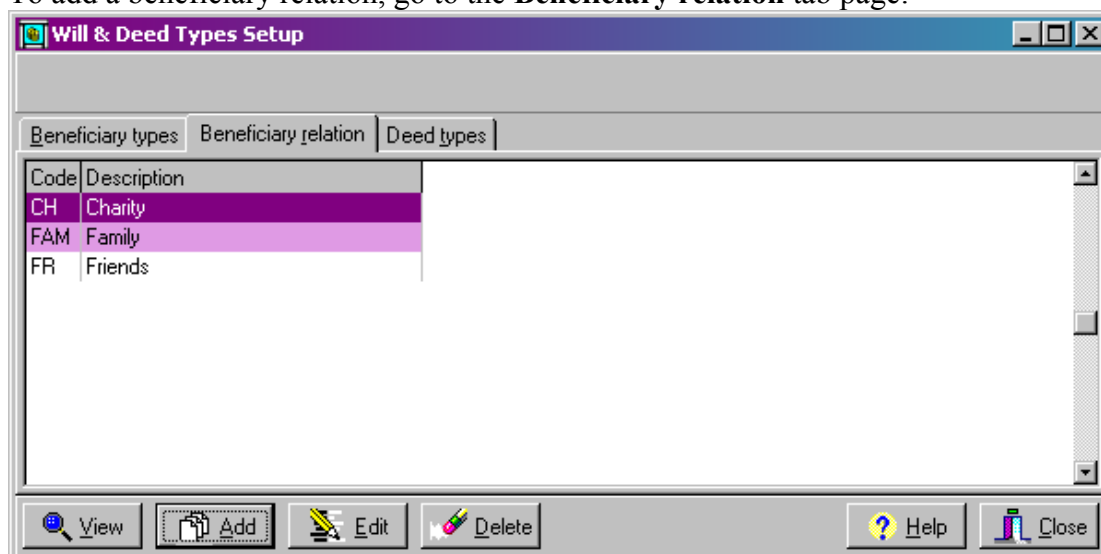
Code

Description

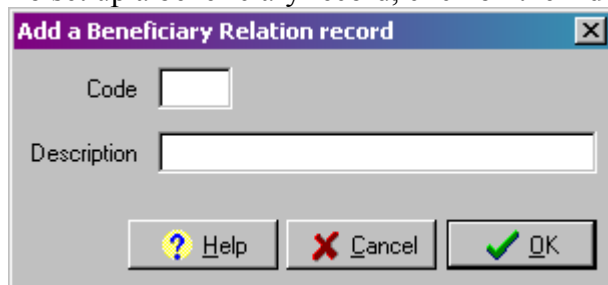
Enter a code and description and click on the **OK** button.

## Adding a beneficiary relation

To add a beneficiary relation, go to the **Beneficiary relation** tab page:



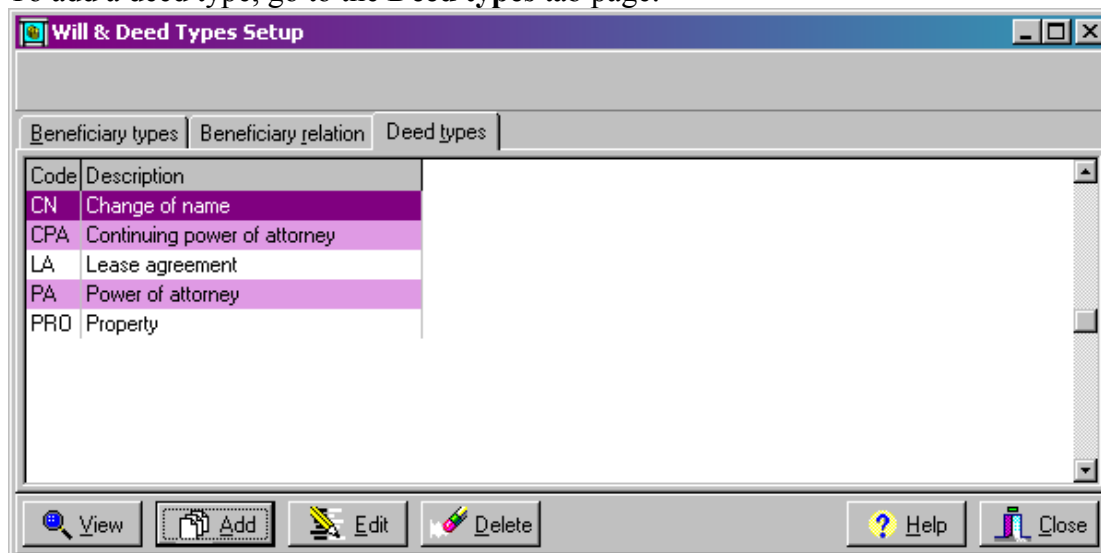
To set up a beneficiary record, click on the **Add** button:



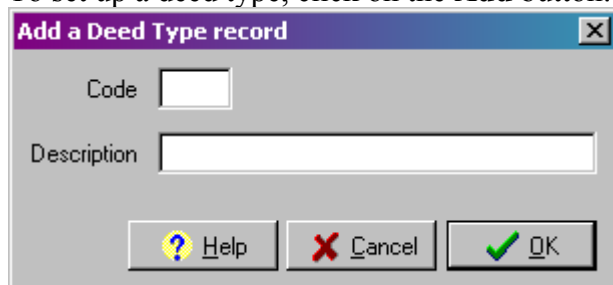
Enter a code and description and click on the **OK** button.

## Adding a deed type

To add a deed type, go to the **Deed types** tab page:



To set up a deed type, click on the **Add** button:

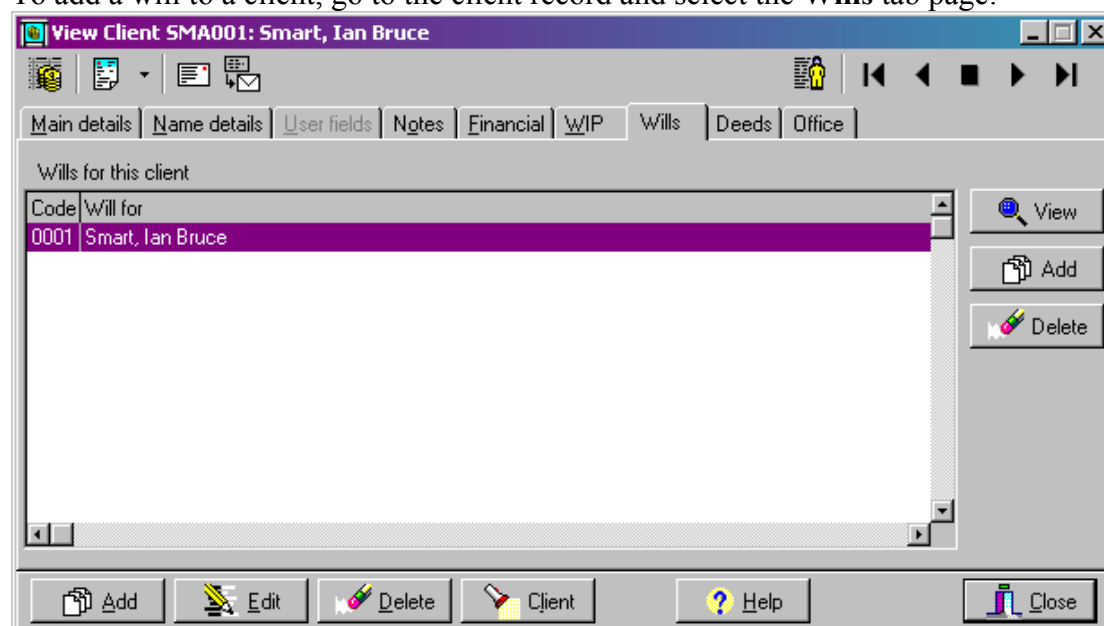


The screenshot shows a dialog box titled "Add a Deed Type record" with a close button (X) in the top right corner. The dialog contains two input fields: "Code" with a small text box and "Description" with a larger text box. At the bottom, there are three buttons: "Help" (with a question mark icon), "Cancel" (with a red X icon), and "OK" (with a green checkmark icon).

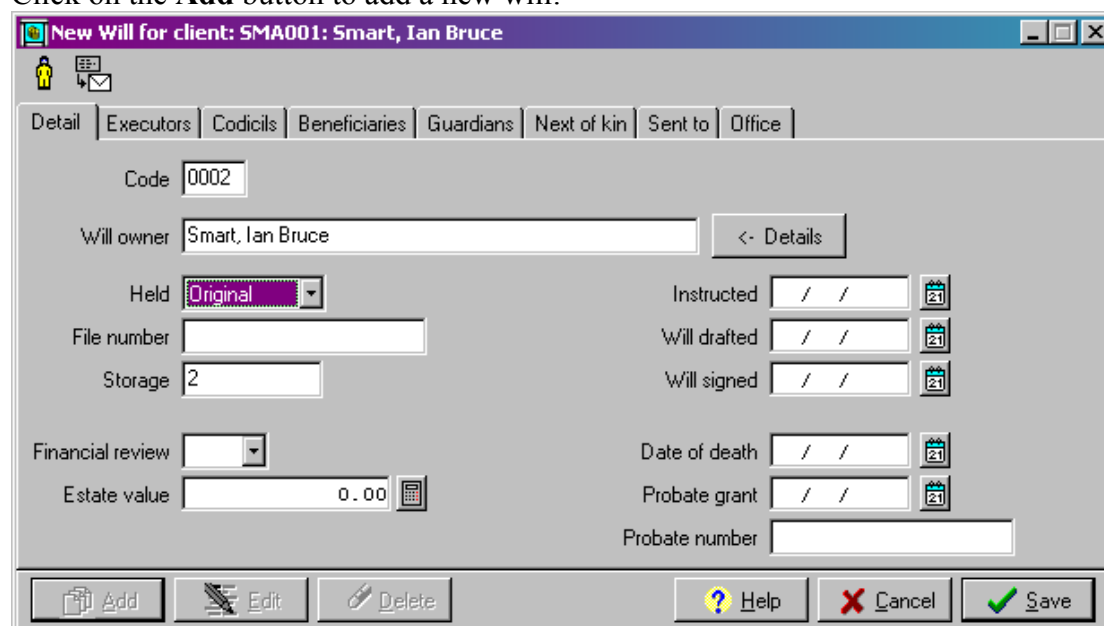
Enter a code and description and click on the **OK** button.

## Adding a will to a client

To add a will to a client, go to the client record and select the **Wills** tab page:



Click on the **Add** button to add a new will:

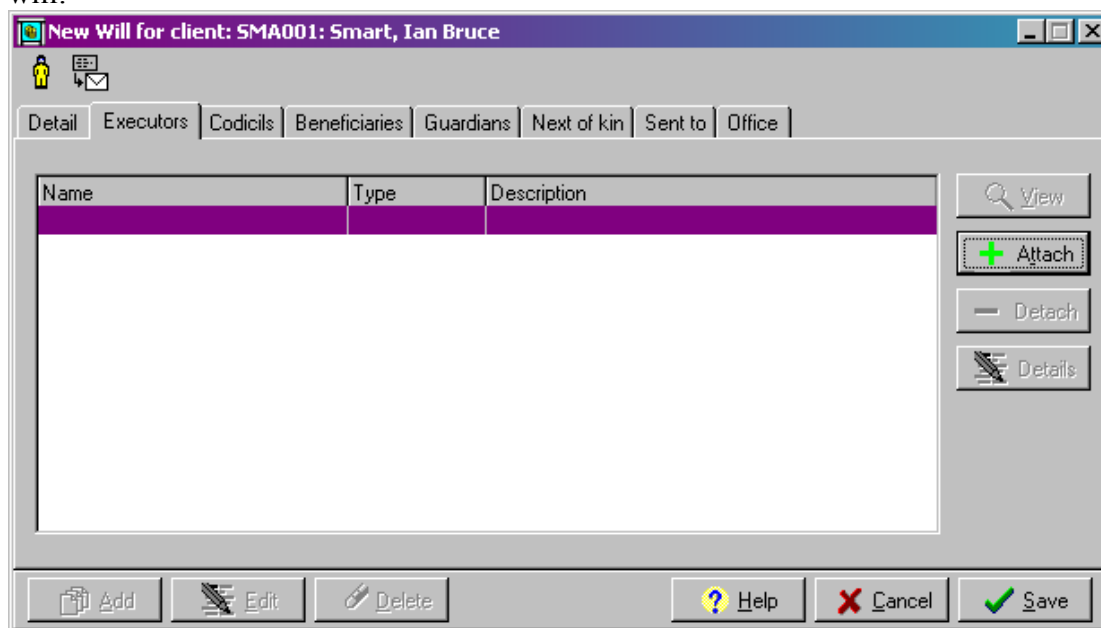


The fields available on the **Detail** tab page are:

- **Code** is the will's unique code within the client. It is a 4 digit numeric code. If you are adding a record, you should, in most cases, accept the default code that appears. This represents the next available code for a new will.
- The **Will owner** is the individual to whom the will belongs. Use the **Details** button to the right to assign or look at the linked individual.
- The **Held** field allows you to specify whether you hold an original or copy of the will.
- The **File number** is an associated file number.
- **Storage** is the location where the will is physically stored.
- **Financial review** allows you to record whether the client requires a regular financial review.

- The **Estate value** is the value of the estate.
- **Instructed** is the date that the client instructed you to write the will.
- **Will drafted** is the date that the will was drafted.
- **Will signed** is the date that the will was signed.
- **Date of death** is the date when the client died.
- **Probate grant** is the date when probate was granted.
- **Probate number** is the probate number.

The **Executors** tab page allows you to record information about the executors on the will:



- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.

The **Codicils** tab page allows you to add details of two codicils:

You can record codicil details against the will. The fields available on the **Codicil** page are:

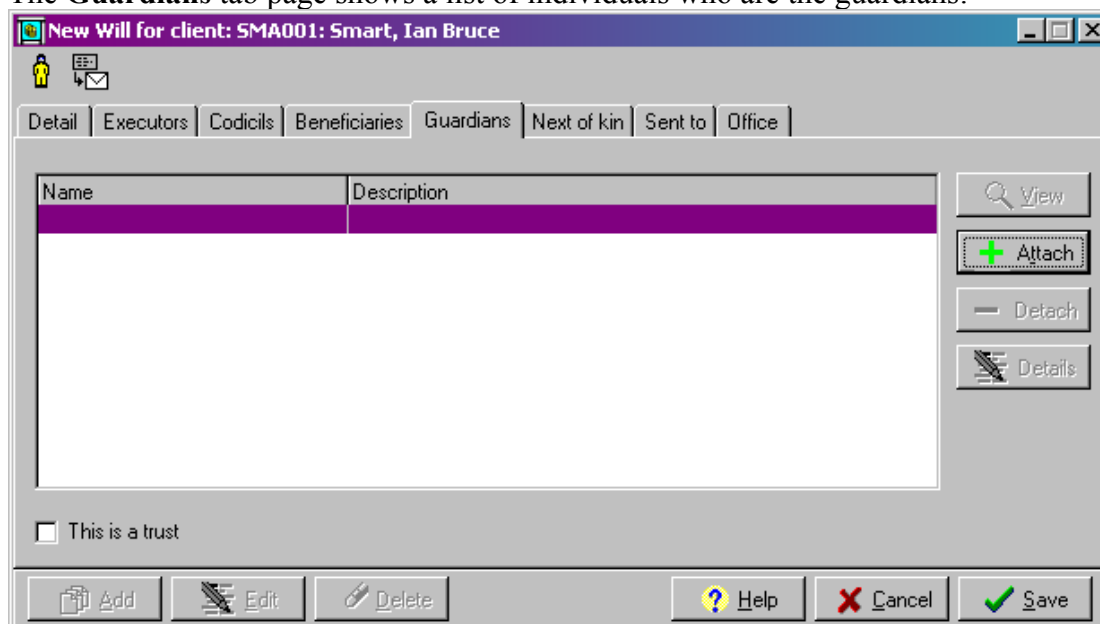
- **Codicil date** is when the will was modified.
- **Details** allows you to record details of the modification.
- There is also the option to add details of a second codicil.

The **Beneficiaries** tab page shows a list of individuals who are the will beneficiaries:

Name	Type	Relation	Description

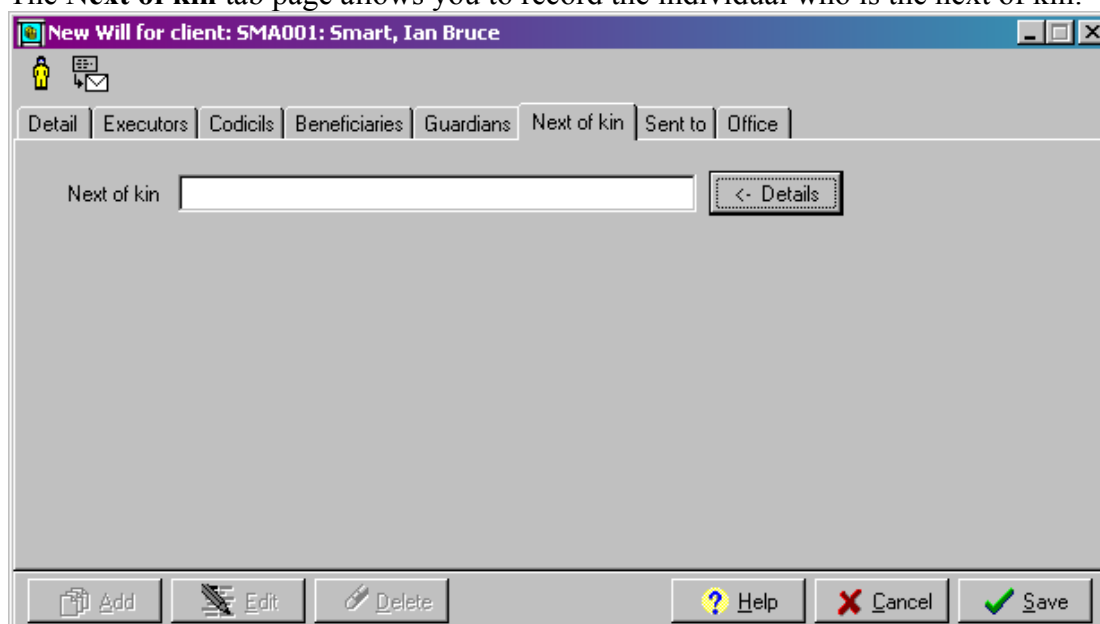
- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list.
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.

The **Guardians** tab page shows a list of individuals who are the guardians:



- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list.
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.
- **This is a trust** indicates a trust has been setup.

The **Next of kin** tab page allows you to record the individual who is the next of kin:



Use the **Details** button to the right to assign or look at the linked individual.

The **Sent to** tab page can be used to record details of where the will has been sent:

The screenshot shows the 'Sent to' tab of the software interface. The window title is 'New Will for client: SMA001: Smart, Ian Bruce'. The 'Sent to' tab is selected. The form contains the following fields and controls:

- Copy name & address** button
- Name**: Text input field
- Street**: Text input field
- Town**: Text input field
- County**: Text input field
- Postcode**: Text input field
- Country**: Text input field
- Sent out by**: Text input field
- Date sent out**: Date picker ( / / )
- Date returned**: Date picker ( / / )

At the bottom of the form, there are buttons for **Add**, **Edit**, **Delete**, **Help**, **Cancel**, and **Save**.

You can record:

- The name and address of where the will has been sent. Use the **Copy name & address** button to copy the name and address from another individual record.
- **Sent out by** is the person who sent it out.
- **Date sent out** is the date it was sent out.
- **Date returned** is the date it was returned.

The **Office** tab page is used to record further details about the will:

The screenshot shows the 'Office' tab of the software interface. The window title is 'New Will for client: SMA001: Smart, Ian Bruce'. The 'Office' tab is selected. The form contains the following fields and controls:

- Branch**: Dropdown menu
- Partner**: Check box with edit icon
- Fee earners**: Three check boxes with edit icons
- Last review**: Date picker ( / / )
- Updated by**: Text input field
- Last update**: Text input field
- Notes**: Text area

At the bottom of the form, there are buttons for **Add**, **Edit**, **Delete**, **Help**, **Cancel**, and **Save**.

The fields available on the **Office** tab page are:

- **Branch** is filled in if this will is specific to a branch.
- **Partner** is an associated partner.
- **Fee earners** are associated fee earners.
- **Notes** can be used for any miscellaneous notes.
- **Last review** is when the will was last reviewed.
- **Updated by** is who updated the will last.
- **Last update** is when the will was last updated.

Click on the **Save** button to save the will details.  
The will details will be stored against the client record:



## Reporting on Wills

You can produce a list of wills on Millennium by selecting the **Reports** scroll and clicking on **Wills>>Will Listing**:



This report lists all the wills held against a client.

 A screenshot of the 'Will Listing' report configuration window. The window has a purple title bar and a grey background. It contains several input fields and controls:
 

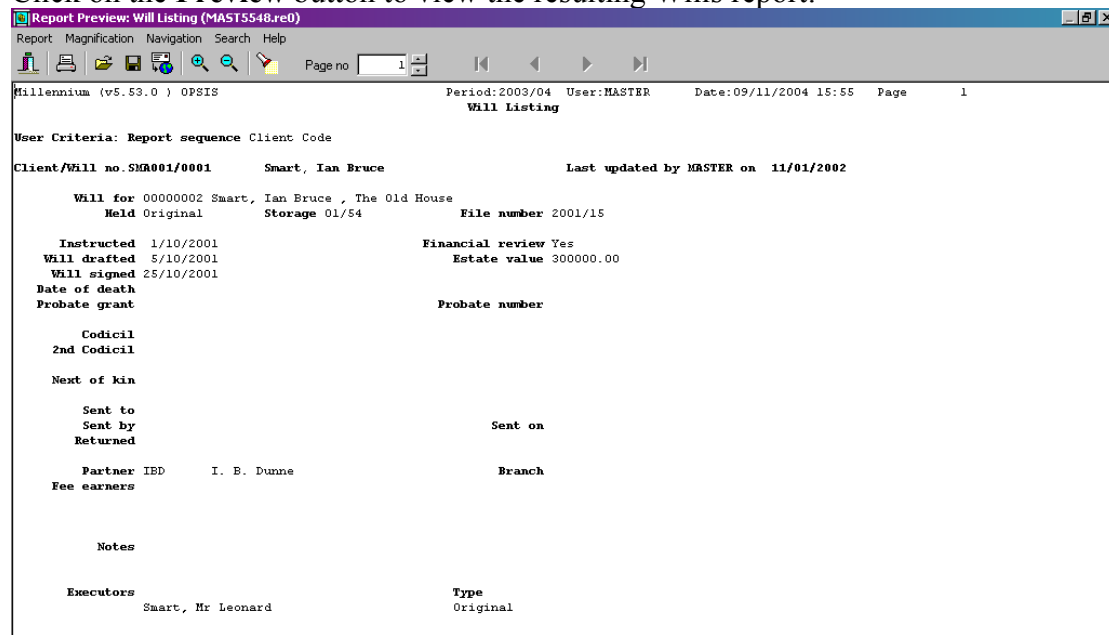
- From client code: [ ] [icon]
- To client code: [ ] [icon]
- From client alpha: [ ]
- To client alpha: [ ]
- For Executor: [ ] [icon]
- From date instructed: [ / / ] [calendar icon]
- To date instructed: [ / / ] [calendar icon]
- From date signed: [ / / ] [calendar icon]
- To date signed: [ / / ] [calendar icon]
- Branch: [ ] [dropdown arrow]
- Summary only
- Report sequence: [ Client Code ] [dropdown arrow]

 At the bottom right, there are three buttons: 'Help' (with a question mark icon), 'Preview' (with a magnifying glass icon), and 'Close' (with a window icon).

The following sort fields are available:

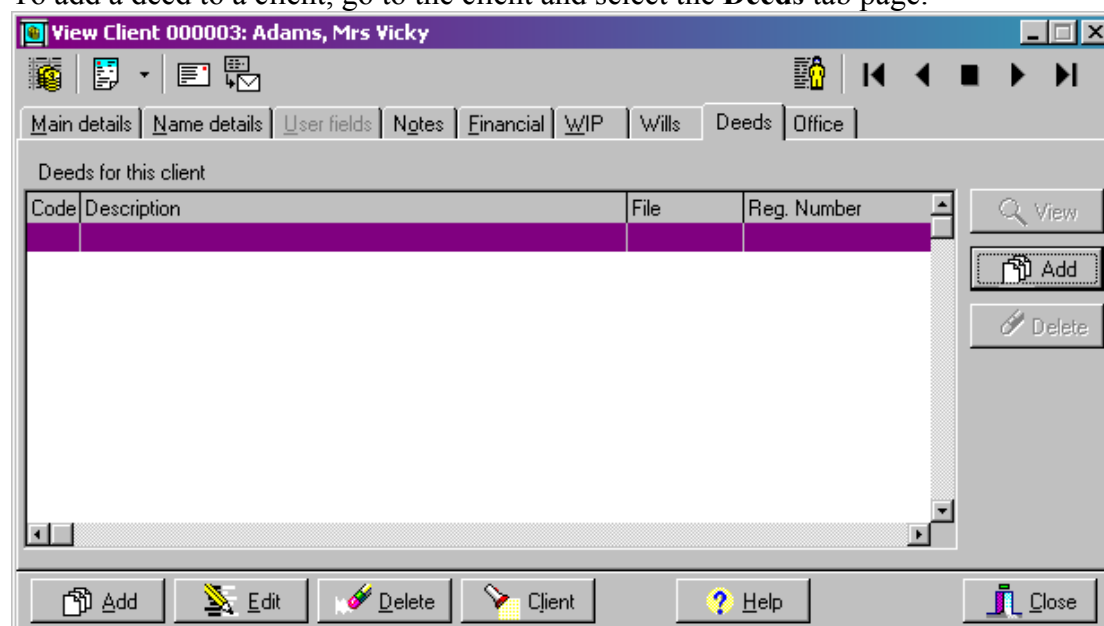
- **From client code** - only wills for this client code or following codes will be selected.
- **To client code** - only wills for this client code and preceding codes will be selected.
- **From client alpha** - only wills with clients whose alpha code matches or follows this will be selected.
- **To client alpha** - only wills with clients whose alpha code matches or precedes this will be selected.
- **For executor** - only wills for this executor are selected.
- **From date instructed** - only wills instructed on or after this date are selected.
- **To date instructed** - only wills instructed on or before this date are selected.
- **From date signed** - only wills signed on or after this date are selected.
- **To date signed** - only wills signed on or before this date are selected.
- **Branch** - only wills for this branch are selected.
- **Summary** - summarised listing excluding the details if ticked.

- **Report sequence** - allows you to specify the report order.
- Click on the **Preview** button to view the resulting Wills report:



## Adding a deed to a client

To add a deed to a client, go to the client and select the **Deeds** tab page:



Click on the **Add** button to add a new deed:

You can add relevant details for this deed to the **Detail** tab page:

- **Code** is the deed's unique code within the client. It is a 4 digit numeric code. If you are adding a record, you should, in most cases, accept the default code that appears. This represents the next available code for a new deed.
- The **Deed reg. no.** is the deed registration number.
- The **Title number** is the deed title number.
- **Description** is the deed description.
- **Form** is the deed type of form.
- **Deed type** is the deed type.
- **Map ref.** is the property map reference.
- **Deed address** is the deed address.

- **File** is an associated file reference.
- **Old file** is the old file reference.
- **Storage** is where it is stored. If you enter a number into this field it will be remembered and next time you add a new record the next number will be used as a default.

The **Sent to** tab page can be used to record information about where the deeds have been sent:

**New Deed for client: 000005: Walker, Miss Chris**

Detail | **Sent To** | Undertakings | Other Parties | Lenders | Office

Copy name & address

Name  Sent out by

Street  Date sent out  / /

Town  Date returned  / /

County

Postcode  Country

Add Edit Delete Help Cancel Save

You can record:

- The name and address of where the deed has been sent. Use the **Copy name & address** button to copy the name and address from an individual record.
- **Sent out by** is the person who sent it out.
- **Date sent out** is the date it was sent out.
- **Date returned** is the date it was returned.

The **Undertakings** tab page can be used to record information about undertakings included in the deed. If a solicitor makes a formal agreement to do something or to carry out a particular course of action as part of the service to a client, then this can be described as an undertaking:

**View Deed 000003/0001: Adams, Mrs Vicky**

Detail | Sent To | **Undertakings** | Other Parties | Lenders | Office

Date	Undertaking to	Description

View Add Edit Delete

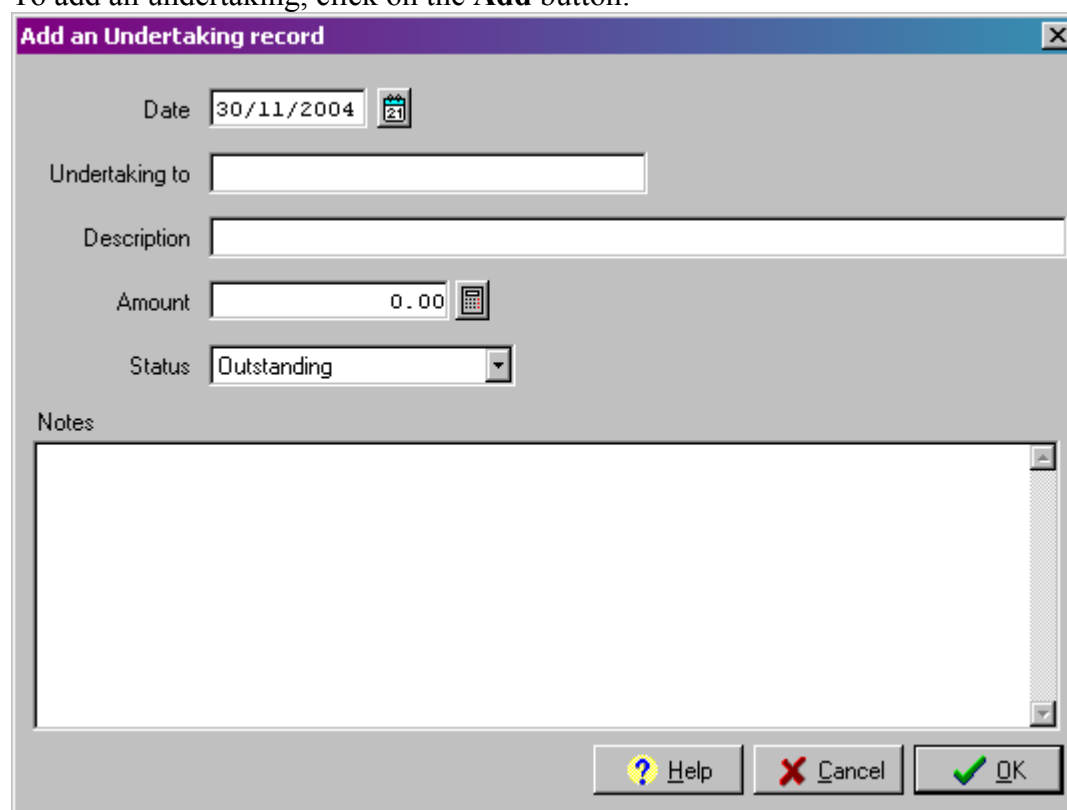
Add Edit Delete Help Close

**Please note that the Undertakings tab page is only viewable AFTER the deed record has been saved.**

- The **View** button allows you to view an undertaking.
- The **Add** button allows you to attach an undertaking to the deed.

- The **Edit** button allows you to edit an undertaking.
- The **Delete** button allows you to delete an undertaking from the deed.

To add an undertaking, click on the **Add** button:



**Add an Undertaking record**

Date: 30/11/2004

Undertaking to:

Description:

Amount: 0.00

Status: Outstanding

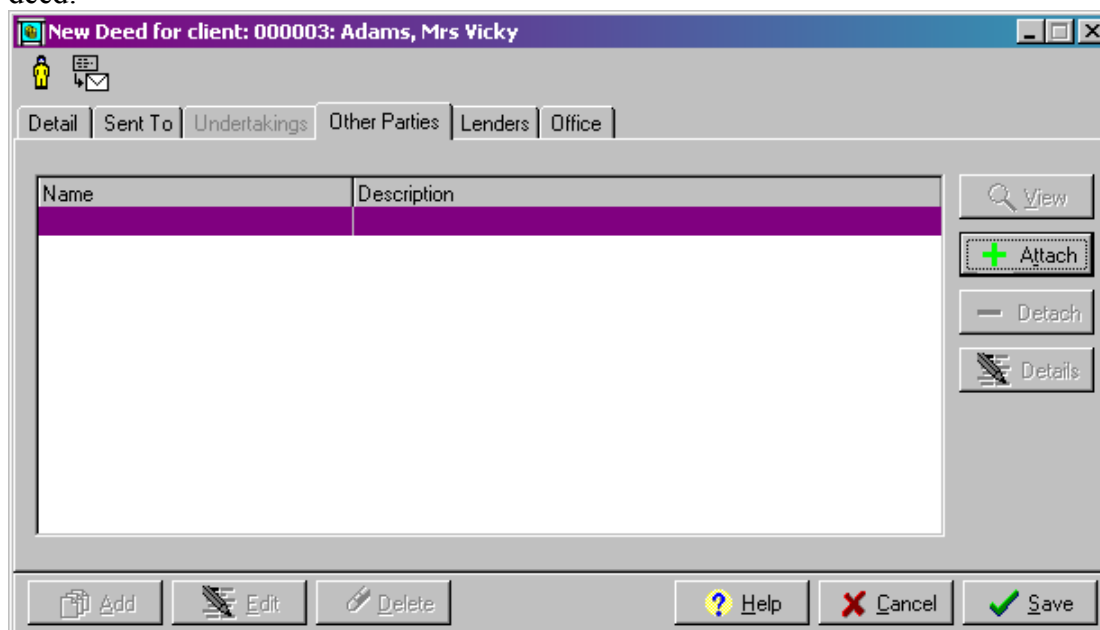
Notes:

Buttons: Help, Cancel, OK

You can record the details of an undertaking in the deeds:

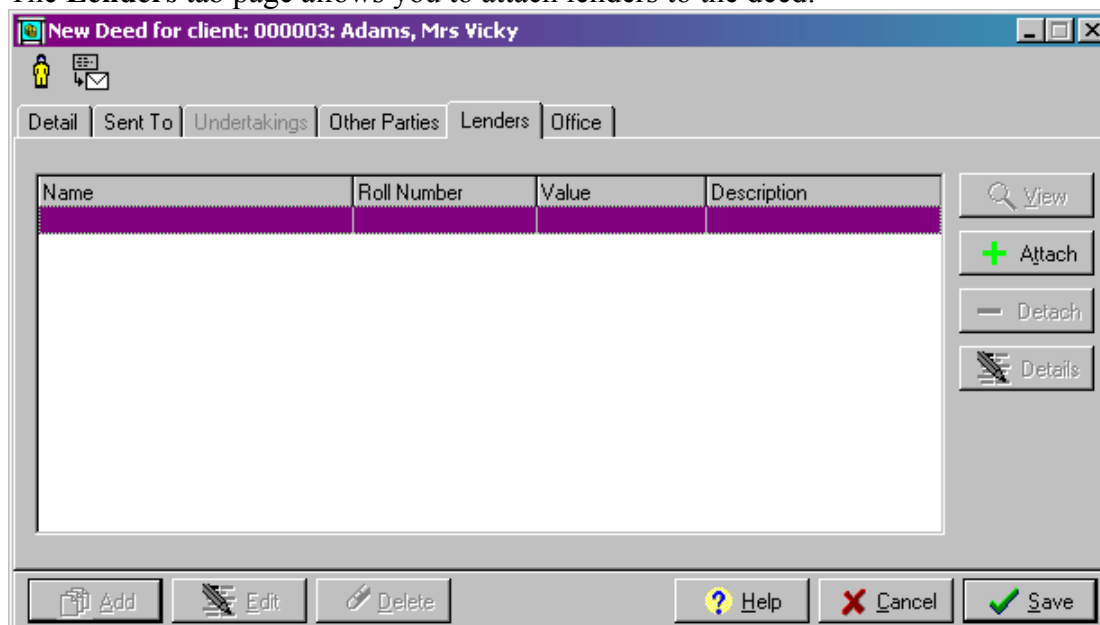
- **Date** is the date of the undertaking.
- **Undertaking to** is the client, individual, company or other entity for whom the undertaking is to be carried out.
- **Description** is a description of the undertaking.
- **Amount** is the amount of the undertaking.
- **Status** is outstanding if the undertaking has not been carried out or cleared if it has.

The **Related Parties** tab page allows you to attach other parties who are related to the deed:



- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list.
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.

The **Lenders** tab page allows you to attach lenders to the deed:



- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list.
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.

The **Office** tab page allows you to record office related information for this deed:

The screenshot shows a software window titled "New Deed for client: 000003: Adams, Mrs Vicky". The "Office" tab is selected. The interface includes a "Branch" dropdown menu, a "Partner" checkbox, and three "Fee earners" checkboxes, each with a small edit icon. To the right, there are "Updated by" and "Last update" text input fields. A large "Notes" text area is at the bottom. The bottom toolbar contains buttons for "Add", "Edit", "Delete", "Help", "Cancel", and "Save".

The fields available on the **Office** tab page are:

- **Branch** is filled in if this deed is specific to a branch.
- **Partner** is an associated partner.
- **Fee earners** are associated fee earners.
- **Notes** can be used for any miscellaneous notes.
- **Updated by** is who updated the deed last.
- **Last update** is when the deed was last updated.

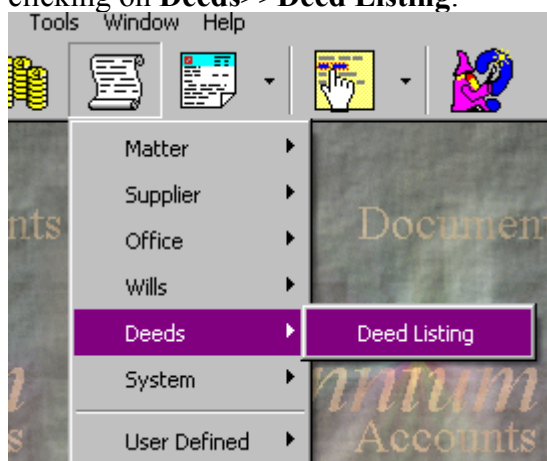
Click on the **Save** button to save the deed details.

The deed details will be stored against the client record:

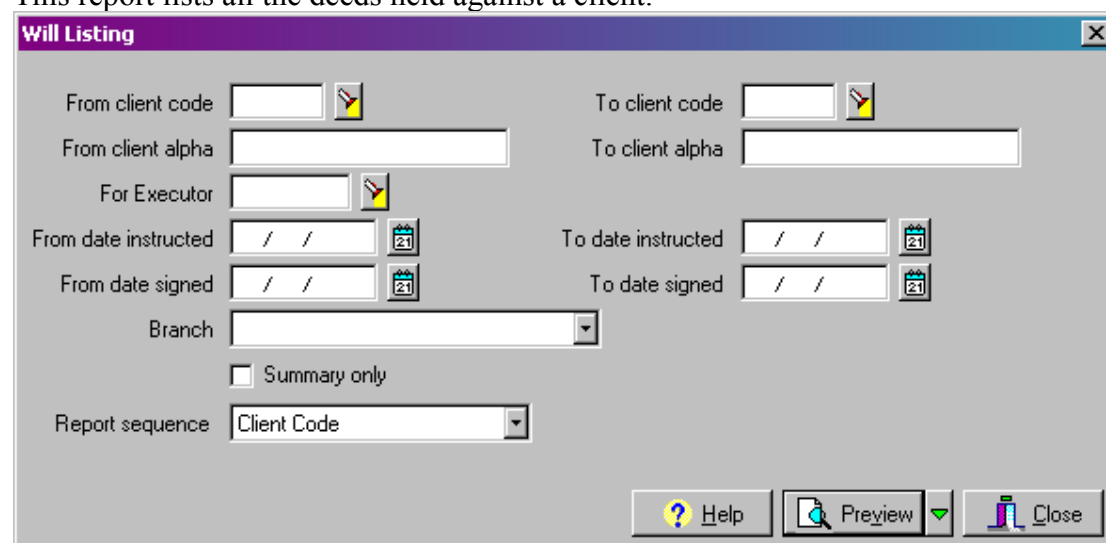
The screenshot shows a summary view of the client record with the "Office" tab selected. It displays three summary items: "Matters: 2", "Wills: 0", and "Deeds: 1", each with a small icon representing the category.

## Reporting on Deeds

You can produce a list of wills on Millennium by selecting the **Reports** scroll and clicking on **Deeds>>Deed Listing**:



This report lists all the deeds held against a client.



The following sort fields are available:

- **From client code** - only wills for this client code or following codes will be selected.
- **To client code** - only wills for this client code and preceding codes will be selected.
- **From client alpha** - only wills with clients whose alpha code matches or follows this will be selected.
- **To client alpha** - only wills with clients whose alpha code matches or precedes this will be selected.
- **For executor** - only wills for this executor are selected.
- **From date instructed** - only wills instructed on or after this date are selected.
- **To date instructed** - only wills instructed on or before this date are selected.
- **From date signed** - only wills signed on or after this date are selected.
- **To date signed** - only wills signed on or before this date are selected.
- **Branch** - only wills for this branch are selected.
- **Summary** - summarised listing excluding the details if ticked.
- **Report sequence** - allows you to specify the report order.

