Customising document templates - AU

Corporate Admin comes with a set of document templates, so you or your client can keep a record of corporate decisions.

These templates include minutes of meetings, letters, share certificates and more.

Some templates have two different versions:

- Classic—the original Corporate Admin template style
- New—the new and improved Corporate Admin template style

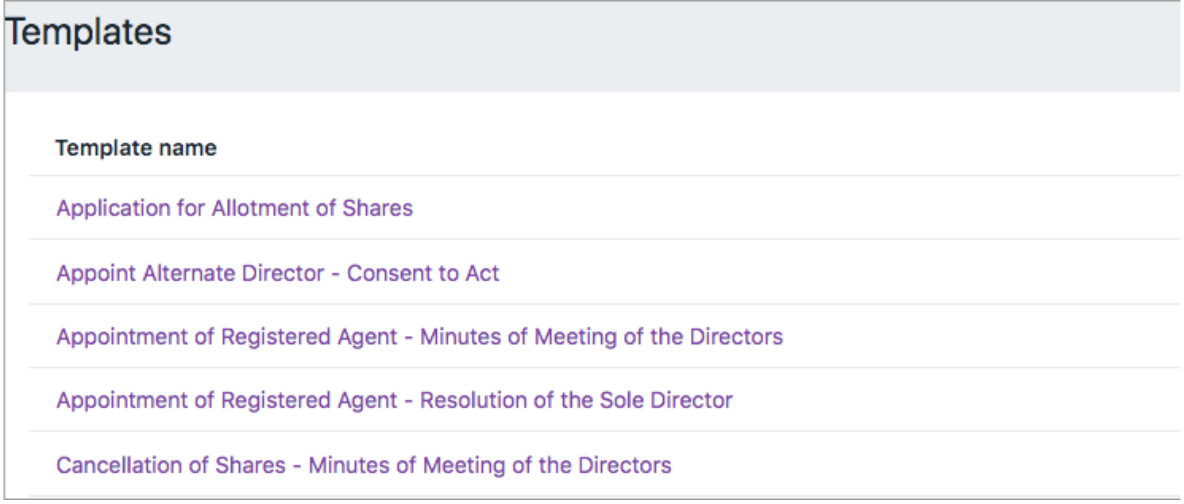
You can switch between the new templates and classic templates at any time by changing the style of the template.

You can modify the default paragraphs or add your own personal touch by changing the font and style.

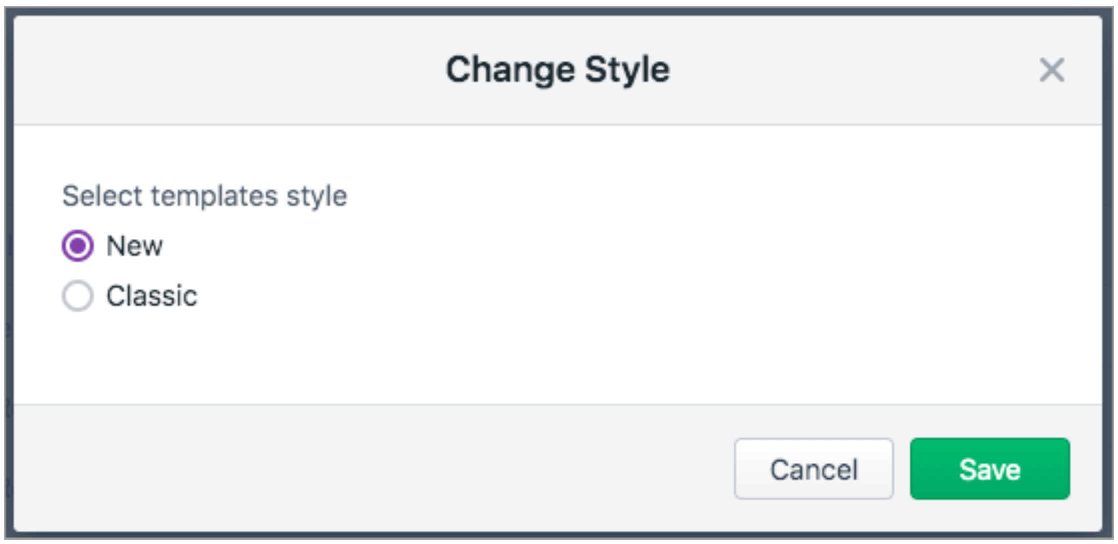
When you save your changes, the changes are applied practice-wide and are effective for all employees and all clients.

To change template style

1. From MYOB Practice, click Settings on the left navigation bar.
2. Under Practice defaults, click Templates.
3. Click Change style.



4. Select **New** to switch to the new and improved Corporate Admin template, or **Classic** to switch to the original Corporate Admin template.

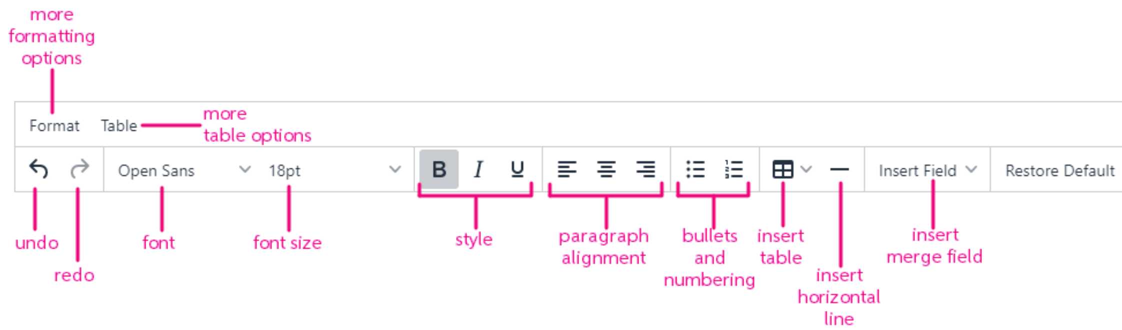


5. Click **Save**.

To edit a template

> Once saved, the customised template will become the new master template. New templates can't be created just yet.

1. From **MYOB Practice**, click **Settings** on the left navigation bar.
2. Under **Practice defaults**, click **Templates**.
3. Click the name of the template to edit.
4. Enter any additional text, or use the tools on the toolbar to format text, bullet points, tables or add a merge field.



To remove all changes and return to the default template, click **Restore Default**.

> The merge fields available for use depend on the template you're customising.

5. Click **Save** to save and apply your changes.

List of merge fields

When customising a document template, the merge fields available for use depend on the template that you're customising.

AddressMultiLineBusiness
AddressMultiLinePostal
AddressMultiLineRegistered
AddressPrincipalPlaceOfBusiness
AddressRegistered
CancelSharesMembersList
CompanyAbn
CompanyAcn
CompanyFormerName
CompanyIncorporatedPlace
CompanyInvoiceAmount
CompanyName
CompanyReviewDateNotified
DeregistrationDate

IssueSharesMembersList
MeetingDate
MeetingMemberAttendeeMultiList
MeetingMultiLineAddress
MeetingOfficerAttendeeMultiList
MemberAcn
MemberMultiLineAddress
MemberName
MemberSingleLineAddress
MemberTransfereeAcn
MemberTransfereeMultiLineAddress
MemberTransfereeName
MemberTransferorAcn
MemberTransferorCeased
MemberTransferorMultiLineAddress
MemberTransferorName
NewCompanyName
NewPrincipalPlaceOfBusinessAddress
NewRegisteredAddress
OfficerAlternateDirectorFor
OfficerAppointDate
OfficerAppointPosition
OfficerAppointment
OfficerCeaseDate
OfficerCeasePosition
OfficerCeasing
OfficerEffectiveTo
OfficerName
OfficerPosition

OfficerResidentialAddress
OfficerResignationDate
OfficerSignatoryList
PersonAddressMultilineResidential
PersonBirthCity
PersonBirthCountry
PersonBirthDate
PersonBirthState
PersonCeaseDate
ResignationReason
ShareAmountPaidPerShare
ShareAmountUnpaid
ShareCancelAmountPaidPerShare
ShareCancelReason
ShareCertificateNumber
ShareClass
ShareDistinctiveFrom
ShareDistinctiveTo
ShareNumberAlloted
ShareNumberHeld
ShareTotalPaid
ShareTransferDate
ShareTypeDescription
SharesAlloted
Signatory
SpecialPurposeCompanyChangeDate
TransferSharesMembersList
AgentName
AgentContact

AgentRegisteredNumber
AgentAddress
AgentDateOfAppointment
ChangeOfAddressEffectiveDate
UHCName
UHCAcn
UHCIncorporatedPlace
PersonPlaceOfBirth
AlternateOnBehalfOf
OfficerTermsOfAppointment
AddressMultiLine
SpecialPurposeCompanyType