

SESSION 2 OF 8

“More Settings”

The stuff that gets skipped in 1:1s and training videos:
system settings, template libraries and third-party
connections.

9:05-10:00



Will Writer Pro

“More Settings”



“

Any customer can have a car painted any colour that he wants, so long as it is black.

Henry Ford, 1909

We disagree.

Will Writer Pro gives you more options than a Dulux colour chart, and considerably more flexibility than I'll probably have by the end of today 😊

In this session we go behind the scenes: the settings that get skipped in 1:1s and training videos, each followed by a live demo.

Accounting

Calendar

Letter library

Tags

SMS

Will drafting

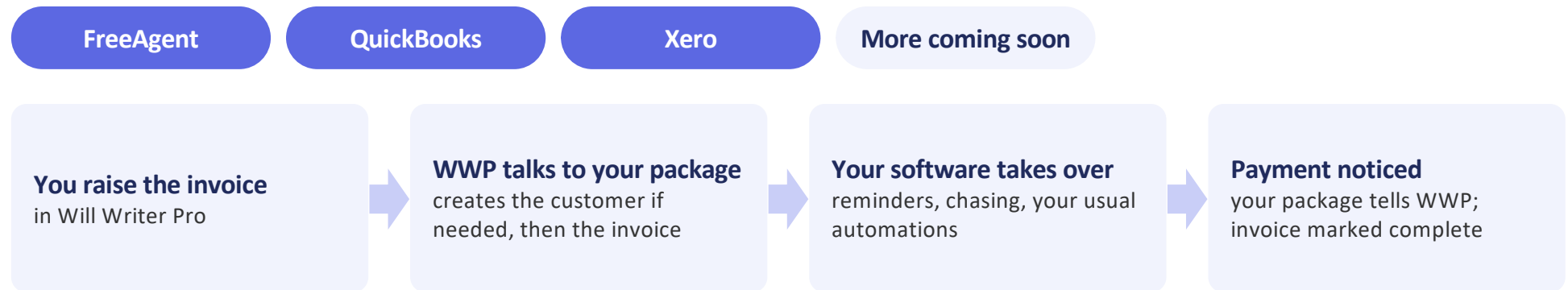
LPA settings

Clause library

Accounting



Connect your accounting package. Optional. FreeAgent, QuickBooks and Xero today, with more on the way. Will Writer Pro still creates the invoice; your accounting software takes it from there.



A handle, not a snoop. WWP keeps a handle on the invoices it created and nothing else. It never looks inside your accounts or your bank. Mark an invoice paid in WWP and it tells your package; mark it paid there and it tells WWP.

Price lists, bank and VAT details. Build standard prices for your products and services. On each invoice pick what was bought, tweak price or wording if you like, and send. Your MI dashboard updates, and you can push the invoice to Relata (the client portal) for card payment.

[Live demo next](#)

Calendar integration

Use Outlook? Connect it. Create appointments inside Will Writer Pro and they appear in your calendar, your client gets an invite, and if Relata is switched on they can see it in their portal too.

1

Appointments

Created in WWP, they land in Outlook with an invite to the client and, with Relata on, in the client's portal.

2

Two-way, but only for what WWP created

Move an appointment in Outlook and WWP updates. Move it in WWP and Outlook updates. WWP keeps a handle on its own appointments; it never reads the rest of your outlook account.

3

Diary actions

To-dos and tasks with a date attached. Create them in WWP and they sync across to Outlook as well.



Live demo next

Letter library



How many times have you written the same covering letter and only changed the name and address? The letter library holds standard letters and emails for every stage of a product's workflow, plus as many ad hoc ones as you like.

Attached to workflow stages

Fires at the right moment in the process, for example when draft documents go out for review.

Ad hoc, for client events

Anything that comes up, such as “you haven't signed the will properly”.

Letters and emails

Standard mail-merge fields

Personalised for every client

 Live demo next

Tags

What is a CRM tag?

A short label you stick on a client record. Unlike a field, a tag isn't fixed in advance: you create and manage your own, add as many as you like to any client, and search by them when you need to find a group of people.

Think of it as your own shorthand for the things you know about a client that no form asks for.

[Create your own](#)[Add to any client](#)[Search by tag](#)

For example

[High net worth](#)[Likes to complain](#)[Has a vulnerable child](#)[Referred by an IFA](#)[Review due 2027](#)

Then search: "show me every high net worth client without an LPA".

[Live demo next](#)

SMS

Text your clients from inside Will Writer Pro.

We integrate with Webex Interact, a pay-as-you-go SMS service. Messages go out through your own Webex account, so they use your credit and your sender name.

You set the caller ID. Handy for your business name on every text, and for the occasional message to your kids from Santa.



Webex Interact

Pay as you go. No contract, no bundle.



Your account, your credit

WWP sends; Webex bills you directly.



Your caller ID

Choose the name clients see the text from.



Live demo next

Will drafting settings

Ask two estate planners how a Will should look and you'll get at least five answers. WWP produces Word documents, and this screen is where you make them look like yours.

Configure it yourself

- Fonts and pagination
- Beneficiary addresses in or out
- Your company contact details
- Other default inclusions and exclusions

Beyond the options?

Send us your own cover sheet and attestation pages in Word. Our in-house developers bind them to your account, so every Will comes out with your pages.

Heat binding?

Tell us. We adjust the margins when documents are created to allow for the spine and the glued edge.

 [Live demo next](#)

LPA settings

The same idea as Will drafting settings, applied to LPAs. Set your default preferences and instructions once, and every new LPA starts from them.

1

Health and welfare

Default preferences and instructions for the health and welfare LPA.

2

Property and finance

Default preferences and instructions for the property and financial affairs LPA.

3

Life-sustaining treatment

Set the default option, ready to confirm with each client.

Defaults, not decisions: you can still change anything for an individual client at drafting time.

 [Live demo next](#)

Clause library



Will Writer Pro is built on Parker's Precedents.

It's wonderful and it covers almost everything.

Almost.

Sometimes you want your own favoured wording, and the clause library is where you keep it, ready to drop into any Will.

Your clauses, your words, saved once and reused.

The stallion clause

One of our clients works in equine breeding, where future earnings from a stallion's bloodline are an inheritable asset. Parker's is comprehensive, but it doesn't stretch to specific "horse sperm" clauses 😊

The translation clause

Other clients serve people whose first language isn't English, so they add a clause stating that the Will is being translated into, say, French.

 [Live demo next](#)



Will Writer Pro

ANY QUESTIONS?

Before we refuel the coffee mugs...

