AdviceOS Templates

Guide to editing coded templates

Midwinter Financial Services Pty Ltd

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Introduction

This document has been prepared to assist number of Midwinter templates queries we receive daily basis. The aim is by preparing this guide to assist Support and KAMS to help their clients with basic template related queries.

Purpose

This Can I edit coded template? is a guide to assist templating process as developed by Midwinter for use in Midwinter's Advice operating System (AdviceOS)

This is a reference document for users for creating and editing of SOA insert and templates with all modules within AdviceOS.

- Content controls
- SOA Hierarchy
- Mini codes
- Special words
- General customisation tools

What is coded template?

A coded template is a template that has already mini codes, content controls, special words, comments, custom fields in place. This document helps to edit coded template.

In AdviceOS a template is a document or report that you run through the modules (Total Portfolio Analysis, PlanBuilder, etc.). These templates can be customised by adding or changing tables, graphs, styles and any content within it.

How to add more space and text to content control?

Content controls are covered in paragraphs, tables or bullet points in throughout the document. Time to time, you may need to adjust space or text within the content control. Therefore, you need to adjust content control to add more space. I am going to explain how to add more space to content control in this section.
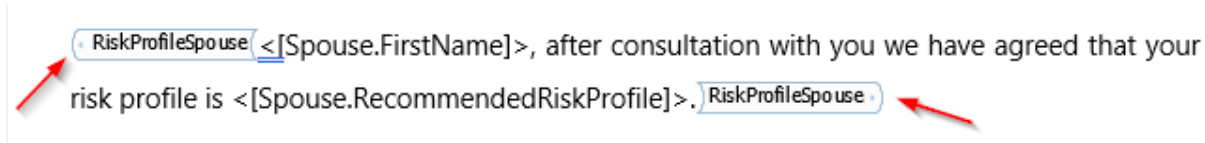
I have divided 2 sections in this

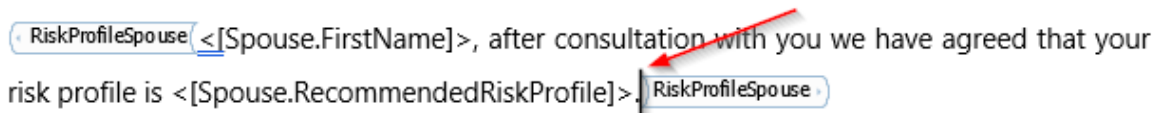Content control within a paragraph

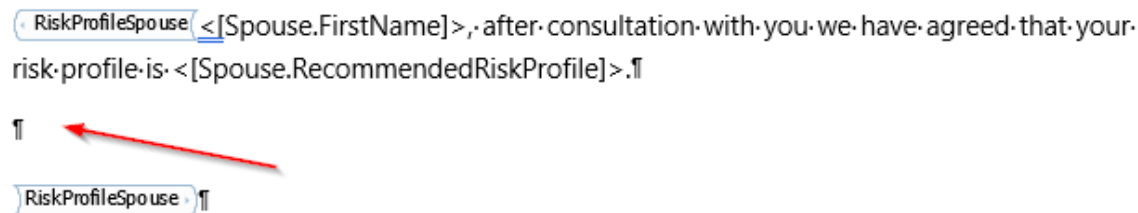Step 1: make sure active the developer tab in your MS word.
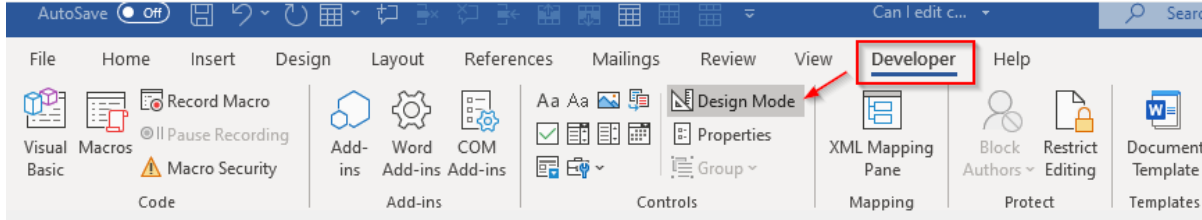
By doing this, you will see the start and the end of the content controls throughout the template.
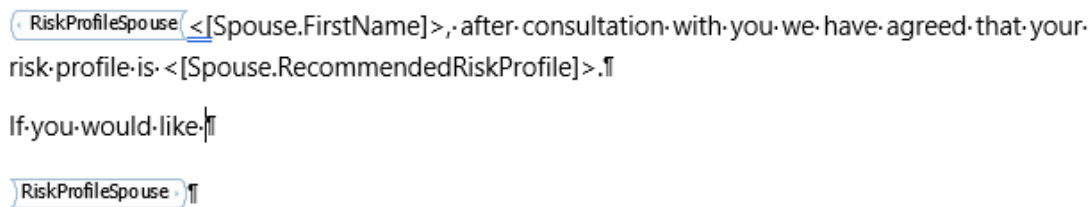

Step 2: bring your curser before the end of the content control.

Step 3: press Enter in your key board.

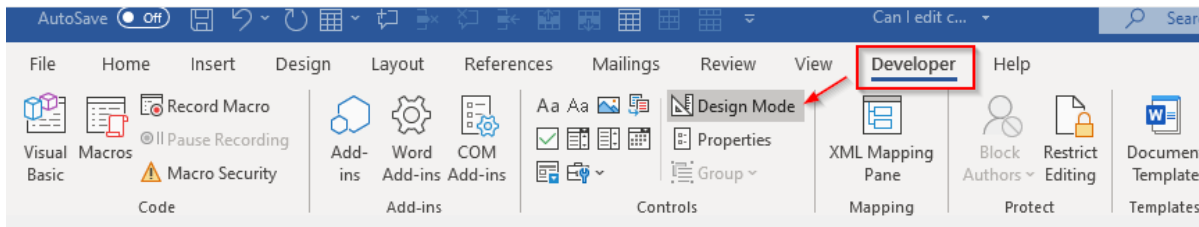Step 4: you can add new text to the content control.

Step 5: make sure save your all hard work by clicking save button in your word version.

Content control with a table

Adding space to content control within a table is bit tricky as this may cause breaking the template. If you follow the following steps, it will make you much easier than you thought.

Step 1: make sure active the developer tab in your MS word.

By doing this, you will see the start and the end of the content controls throughout the template.

Step 2: select the last row in the table

Step 3: insert a new row below

Step 4: split table

Step 5: you will see that table has been divided to two table

Step 6: remove the bottom table by clicking Backspace in your keyboard

Step 7: after removing the bottom table, bring your curser before the end of the content control.

Step 8: press Enter in your key board.

Step 9: you can add text to the below table

The·above·table·shows¶

Step 10: please make sure save your hard work by clicking save button in your word version.

Can I add more rows to special words table?

Yes, you can add more rows to special words table.

Step 1 : search for the special word table where you would like to add more rows to the table.

Best interest - super switching * **Why are these recommendations in your best interest?**

Detailed below are the reasons why we believe these recommendations are in your best interest.

<[SpecialWords[0].Items|R]>
❄ <[Text]>
The recommended superannuation fund has a wide range of investment options that allow you to meet your risk profile and be sufficiently diversified.
The recommended superannuation fund allows you to see individual costs as they are taken from your account. Other providers often build their costs into the balance of your account, making it difficult to determine the effective total cost.
You are unable to meet your asset allocation requirements as per your risk profile using your existing superannuation fund.
Your existing superannuation fund lacks the range of investment options needed to construct a diversified portfolio in line with your attitude to risk and return.
Your portfolio closely matches the benchmark asset allocation of your risk profile. Best interest - super switching *

Step 2: add a row to the existing table by clicking insert below rows

best interest?

Detailed below are the reasons why we believe these recommendations are in you[...] interest.

<[SpecialWords[0].Items|R]>

❄ <[Text]>

The recommended superannuation fund has a wide range of investment optio[...] allow you to meet your risk profile and be sufficiently diversified.

The recommended superannuation fund allows you to see individual costs as th[...] taken from your account. Other providers often build their costs into the balance [...] account, making it difficult to determine the effective total cost.

You are unable to meet your asset allocation requirements as per your risk profile[...] your existing superannuation fund.

Your existing superannuation fund lacks the range of investment options nee[...] construct a diversified portfolio in line with your attitude to risk and return.

Your portfolio closely matches the benchmark asset allocation of your risk profile.
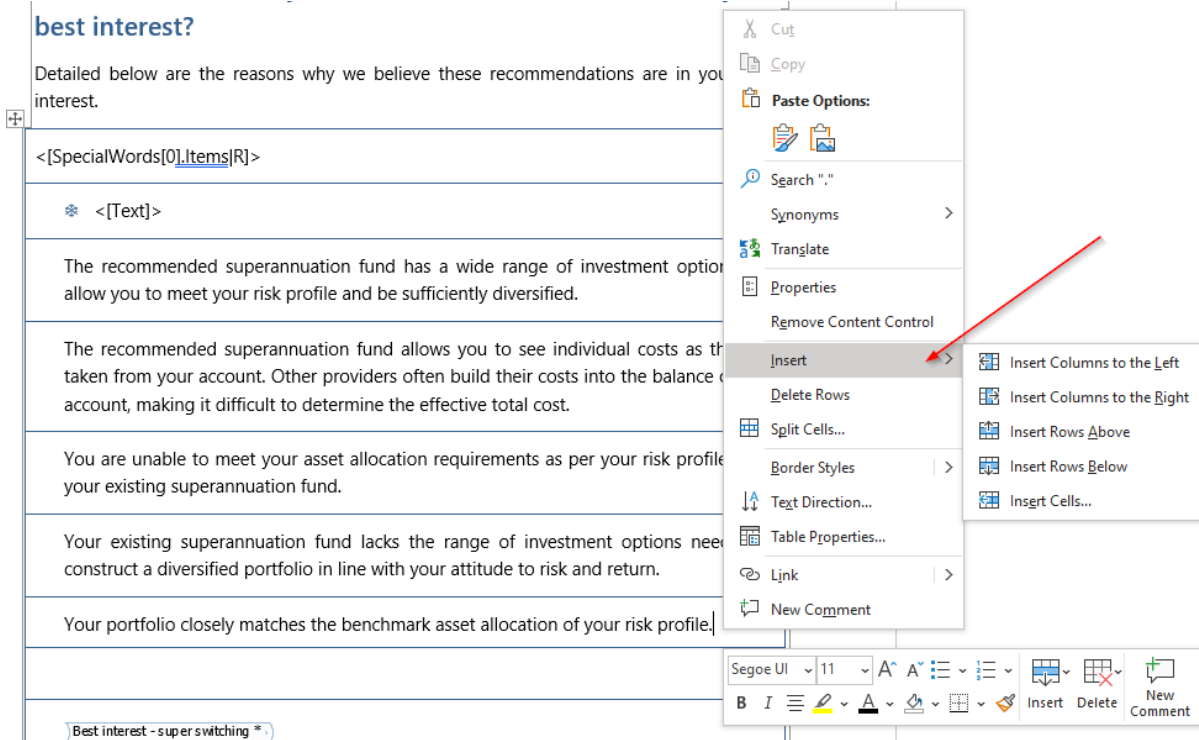
〉Best interest - super switching ＊・〉

Right-click context menu:

- Cut
- Copy
- Paste Options:
- Search "."
- Synonyms
- Translate
- Properties
- Remove Content Control
- Insert
  - Insert Columns to the Left
  - Insert Columns to the Right
  - Insert Rows Above
  - Insert Rows Below
  - Insert Cells...
- Delete Rows
- Split Cells...
- Border Styles
- Text Direction...
- Table Properties...
- Link
- New Comment

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Insert Delete New Comment

Step 3: add text to the newly added rows and please make sure do not leave any blank rows in the table

(Best interest - super switching * **Why are these recommendations in your best interest?**

Detailed below are the reasons why we believe these recommendations are in your best interest.

<[SpecialWords[0].Items|R]>

❄ <[Text]>

The recommended superannuation fund has a wide range of investment options that allow you to meet your risk profile and be sufficiently diversified.

The recommended superannuation fund allows you to see individual costs as they are taken from your account. Other providers often build their costs into the balance of your account, making it difficult to determine the effective total cost.

You are unable to meet your asset allocation requirements as per your risk profile using your existing superannuation fund.

Your existing superannuation fund lacks the range of investment options needed to construct a diversified portfolio in line with your attitude to risk and return.

Your portfolio closely matches the benchmark asset allocation of your risk profile.

Alternative strategy 1 - <insert text>|

Alternative strategy 2) Best interest - super switching * ›

Can we edit advice text?
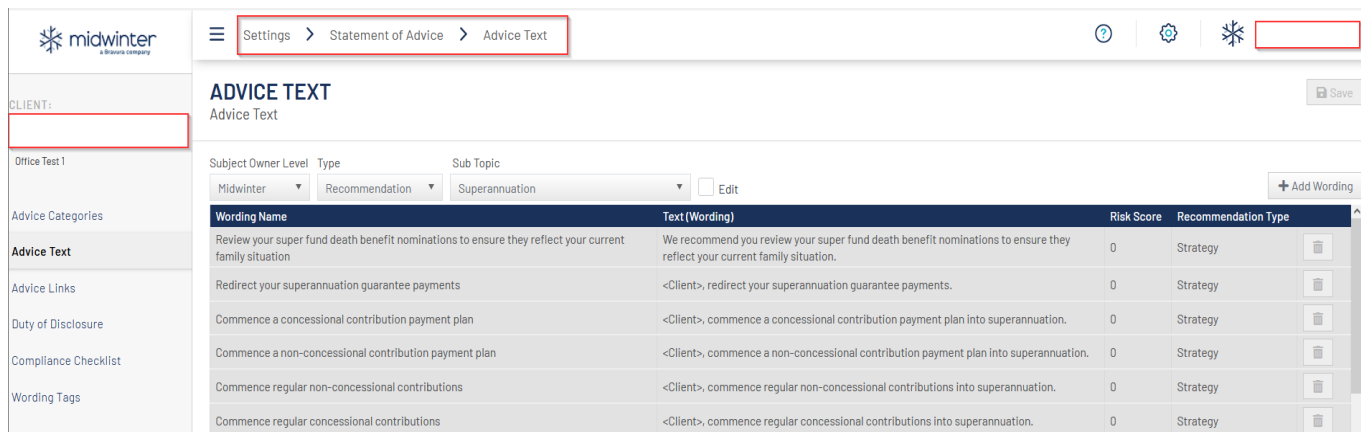
Yes, you can edit the advice text.

How to edit advice text

Advice text is a library of recommendations, benefits, disadvantages and outcomes. From time to time, you may need to update recommendation text or benefits, or disadvantages based on the compliance requirements. Therefore, I am going to explain how to edit advice text in this section.

Step 1 – please check if you have relevant permission to edit advice text. If you are based in practice level, you need to have practice level permission in order to edit advice text. If you are based in dealer group level, you need to have dealer group level permission to edit your advice text.

Step 2 – Location >>>

Go to Home > Settings > Advice text

Step 3 - filter which type you are going to edit along with the subtopic

In this case, I am going to edit advice text by filtering type as Recommendation and subtopic as Superannuation

After you filtered the type and the subtopic, you will see as follows:

Step 4: Please tick edit box to edit advice text

Step 5: after you edited the advice text, please make sure save your hard work by clicking save button.

Can we add comments (questions and answers) to template?

Yes, you can add comments or also knowns as questions and answers to SOA template or ROA template. Please note that, this functionality is limited to Planbuilder SOA or Planbuilder ROA templates.

When the content control surrounding the comment is selected in the SOA tree, the Questions and Answers page will show the list of questions based on the content of the questions that is selecting in the SOA tree.

The comment text has three parameters separated by a "pipe" ('|').

Code

Text to display as the question

True

Step 1: Find a location in the template where you would like to add questions and answers in the template.

Please note that the comments must be created inside a content control.

E.g. I would like to add comments to the below section:

Step 2: Select the text and add comment.

Step 3: Go to the comment and add three parameters

Type Code with a number – please make sure that the number will be unique and will not repeat in the template.

Text to display as the question

True

Step 4: save the template and upload

Step 5: The picture below shows how the comments appear in planbuilder module

☰   Modelling   ﹥   Planbuilder   ﹥   Questions and answers

QUESTIONS AND ANSWERS

Allows user to include and replace text in SOA based on the selected template

SOA name: xxx

Superannuation – [primary] – recommendations – Make a non-concessional contribution	Include text	Replace text	Edit text
Client 1: Non-concessional contribution lump sum amount	☑	☑	XXX

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