m2Compliance Template Tags

Tag Name	Source	Usage Notes
[m2AdviceDate]	Advice Event: + Event Date	Relates to the latest Advice Date associated with selected Advice Events (pre-requisite)
[m2AdviceDeclarations]	Advice Event/s: + Related Info (Declaration)	Relates to all Related Info items of Type='Declaration' associated with selected Advice Events (pre-requisite)
[m2AdviceGiver]	Advice Event/s: + Advice Event Advice Giver	Relates to the selected Advice Events (pre-requisite). Not available on all RoA interfaces
[m2AdviceModeDesc]	Compl. Supvr: + Advice Mode Desc	Relates to the latest Advice Date associated with selected Advice Events (pre-requisite)
[m2AdviceRecipient]	Advice Event/s: + Advice Event Recipient	Relates to the selected Advice Events (pre-requisite). Not available on all RoA interfaces
[m2AdviceTable]	Advice Event/s: + Event Date + Advice Event Product + AdviceEvent Advice + Advice Event Reason	Relates to the selected Advice Events (pre-requisite). 4 Column format
[m2AdviceTableExtend]	Advice Event/s: + Event Date + Advice Event Product + AdviceEvent Advice + Advice Event Qty + Advice Event Value + Advice Event Reason	Relates to the selected Advice Events (pre-requisite). 6 Column format
[m2AdviceTime]	Advice Event: + Event Time	Relates to the latest Advice Date associated with selected Advice Events (pre-requisite)
[m2ClearRoAAlert]	none	Relates to the selected Advice Events (pre-requisite) but formats no data in the SoA but clears down the SoA Reqd alert.Often used to clear-down Advice Events which were set for SoA Reqd but then discovered not to be required. Usually included in a special template for Clearing' the alert and for listing the Advice Events so cleared for Audit purposes by including one of the AdviceTable tags to show the Advice Events being cleared down
[m2ClientAccountName]	Client Info: + Account Name	Note this tag is the same as [m2ClientName] which has superceded this term
[m2ClientAddress]	Client Info: + Street Address + Town/City + State/Province + Zip/Postcode	
[m2ClientAddressFull]	Client Info: + Street Address + Town/City + State/Province + Zip/Postcode + Country	
[m2ClientFirstName]	Client Info: -Primary Contact- + First Name	
[m2ClientFullName]	Client Info: -Primary Contact- + Title + First Name + Surname	
[m2ClientID]	Client Info: + Client ID	
[m2ClientName]	Client Info: + Client Name	same operation as superceded tag [m2ClientAccountName]
[m2ClientNameConditional1]	Client Info: Condition A -Primary Contact- + Title + First Name + Surname + Client Name (on Line 2) Client Info: Condition B -Primary Contact- + Title + First Name + Surname	this is a 'Conditional' tag: Condition A: If Client Type = (Association or Charity or Institution-Company or Partnership or Trust) OR (Title=blank and First Name=blank and Surname=blank). Condition B: (all other cases) Note Condition A has two lines for the Name - Primary Contact name followed by Client Name - typically used for Organisations

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[m2ClientNameConditional2]	Client Info: Condition A + Client Name Client Info: Condition B -Primary Contact- + Title + First Name + Surname	this is a 'Conditional' tag: Condition A: If Client Type = (Association or Charity or Institution-Company or Partnership or Trust) OR (Title=blank and First Name=blank and Surname=blank). Condition B: (all other cases)
[m2ClientText<>]	Compl.Client.Settings: Setting text(SettingName)	these are variables optionally defined for each client. The Compliance Supervisor assigns a 'usage' to each variable and optionally a default value which will apply if no specific value has been set for a specific client. Thes will be maintained as a new sub-tab under the compliance tab.
[m2ClientTitleSurname]	Client Info: -Primary Contact- + Title + Surname	
[m2Email<>Noprint]		allows definition of an email address in a template which is not to be displayed/printed in the generated document but which will be used for other processing purposes, typically for sending the generated document out as an email using an email template. Within the <> zone enter the required email address.
[m2ExecEmail]	User Info: + Executive Email Address	This information is maintained by the System Administrator
[m2ExecName]	Client Info: + Executive	
[m2Insert<{(( ))}>BulletList]	interactive	This type of tag will demand an interaction from the creator of the document at the time of creation. The central variable zone which is delimited by the {(( ))} brackets is optional and can contain pre-prepared text which the user can elect to use unchanged, modify or delete. It is important to note that the text inside the {} zone loses any WORD formatting that may be present in the template, however the entered/retained data can be formatted into a Bullet List with an additional parameter as specified below. Within the {} zone you can also optionally include a user-defined Related-Info item from an Advice Event by placing it's name within (( )) at the appropriate point in the pre-prepared text. If no such Related-Info item exists in the selected Advice Event during the document creation, then the user is advised and the data can then be inserted manually or the entire insert paragraph/s can be removed. Note that the RelatedInfo tag is defined within double (( )) brackets - any text in this zone bound within single ( ) will display as usual within single brackets as standard text. The outer variable zone which is delimited by the <> chevrons will contain the instructions to guide the user as to what is expected for this 'insert'. There optional 'BulletList' parameter will force all lines entered/retained to be displayed as a Bullet List. For example [m2Insert<delete or retain the following sentence{An Appendix is attached.}>]. This will prompt the user with the instructions 'delete or retain the following sentence "An Appendix is attached" and the user can then select 'Dont Insert' or 'Insert' and it will be included in the document or not accordingly.
[m2LastProfileUpdateDate]	Profile Event: + Event Date	latest Profile Update on file
[m2MandateProducts,header=off,width=325]	Mandate Products: + Formatted Row Data	This tag will demand an interaction from the creator of the document at the time of creation and is specifically used to define the scope of products covered by a 'Statement of Advice' (SoA). The current list of Products included in the Mandate for this Client are displayed and the User can then accept this Product list as being correct for the current document or exclude specific Products. Note that the user can not add additional Products, additional products must first be updated on the Mandate if they are to be included in an SoA like this. This table of included Products will then appear as a table in the document.The inserted table can optionally have its header line turned off, and optionally set the width fixed to less than a total page width. The header option is controlled via ',header=off' or ',header=on' or by omitting the attribute (which is also equal to 'on'). The width is a numeric value, where 470 is the max width of a portrait page, and 235 is half of a page width. You may need to play around with widths to get it to fit how you wish. If you omit the header and width attributes the table will use the full width of the page and show the table header.
[m2OptionalSectionStart]		This tag allows a pre-formatted section to be optionally included in the SOA. These tags can be used to surround a formatted section in the document (e.g. containing bullet lists, tables, images). This tag marks the start of the section to be included (or excluded). The user is prompted with a yes/no question only and can't change the content of the section, which allows normal WORD formatting in the WORD template to be carried forward into the section. Note that other m2 compliance tags can also be embedded between the m2OptionalSection... tags, and they will be resolved correctly. You cannot however nest an m2OptionalSection tag within another m2OptionalSection tag. Example [m2OptionalSectionStart<If Life Insurance is Recommended retain. If not recommended then delete this section.>]Life Insurance....etc etc[m2OptionalSectionEnd]

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[m2OptionalSectionEnd]		This tag allows a pre-formatted section to be optionally included in the SOA. This tag marks the end of the section to be included (or excluded). See above
[m2ProfileField<{}>]	Profile Event Field	This tag allows the value of a single KYC profile field to be inserted into the document as text. Within the <> delimiters, the tag-name of the Profile Category must be referenced. Within the {} delimiters, the name of the specific field within that category must be referenced. If the profile category does not exist in the client's KYC, then an error will be issued. If the client has this profile category but the sub-field is not filled out, the user is prompted to manually enter the value during the document creation. If the client has multiple of this profile category defined (such as for different family members), then the user is prompted to manually enter the value during the document creation. Example: [m2ProfileField<Personal-Info{Occupation}>]
[m2PortfolioTable]	Holdings: + Formatted Row Data	the current Portfolio presented in table form made up of three columns: Asset Name, Quantity, Market Value (in the default valuation currency for that Client)
[m2ProfileTable<>width=325]	Profile Event: + Formatted Row data	this type of tag must reference a specific 'Profile category' within the <> delimiters. The table will be formatted as either a 2 or 3 row table according to the rules for that table (e.g. Column headings, Total line etc). If a Profile Category is not found then a warning will be noted that the Profile Category data has not been entered into M2.The inserted table can optionally set the width fixed to less than a total page width. The width is a numeric value, where 470 is the max width of a portrait page, and 235 is half of a page width. If a profile category table has multiple columns, then each column is allocated an equal share of the total width specified.If the particular Profile Category is optional for specific Clients then use the 'Optional' variant of this tag in the template (see below).
[m2ProfileTable<>Optional]	Profile Event: + Formatted Row data	operates the same as [m2ProfileTable<>] except it will not attempt to include it in the document if no Profile Category of that name exists for that Client (i.e it is 'optional').
[m2SelectOne<..{}>]		This tag forces the user to select one option from a list of options. The items in the list must be separated by the Pipe | character or by newlines – if the list items themselves contain a new line, then pipe character must be used. The "Insert Info" button doesn't enable itself until an item is selected. Example [m2SelectOne<Select investor type {Conservative|Balanced|Growth}>]
[m2SelectMultiple<..{}>BulletList]		This tag allows the user to select multiple items from a list and uncheck the remainders that they don't want to be inserted into the document. The separator between list items can be the pipe character or newlines. If the list items contain newline characters, then the pipe character must be used. This tag also supports the BulletList attribute in the same way as the m2Insert tag does - it will then convert any lines from the list to be bullet items in the resulting document.
[m2SelectSoaDispatchDate]		This tag allows the user to select a specific Despatched SoA from a list of the ten most recent SoAs and the Dispatch date of the selected SoA is inserted into the document.
[m2SelectSoaEffectiveDate]		This tag allows the user to select a specific Despatched SoA from a list of the ten most recent SoAs and the Effective date of the selected SoA is inserted into the document.
[m2TodayDate]	+ Current Date	

rows marked in yellow indicate additions or changes made in this version