

TRUST SERVICE TRAINING - LEVEL 1

SESSION 2.0

OVERVIEW

In this session we will learn how to:-

- ⇒ Create documents from the CCH Templates using the Precedent Wizard
- ⇒ Understand & Use the Document Register
- ⇒ Create a Page in the Minute Book
- ⇒ Add minutes from the CCH Templates to the Minute Book
- ⇒ Create a Minute Document using the Minute Wizard

Prerequisites for Level 1, Session 2

- ⇒ The Trust Service Software is Installed at your office
- ⇒ You have the latest version, 4.2
- ⇒ You are comfortable using a PC, Windows Software and have used the Trust Service or seen it demonstrated
- ⇒ You have at least 1 Trust entered onto your database

Preparation for Level 1, Session 2

- ⇒ Print the Session Notes
- ⇒ Set up Webex Meeting Manager on your PC, ideally the day before the session in case you have any difficulties
- ⇒ Dial into the Meeting, using the Link & Password provided 5mins prior to start time