

TRUST SERVICE TRAINING - LEVEL 1

SESSION 4

OVERVIEW

In this session we will learn how to:-

- ⇒ Add a Task to the Task List
- ⇒ Add a Task to the Calendar
- ⇒ Add a Task using the Task Library
- ⇒ Set up Tasks Templates in the Task library
- ⇒ Complete & Delete a Task
- ⇒ View the Task List & Calendar (Single Trust or All Trusts)
- ⇒ Print the Task Report

Prerequisites for Level 1, Session 4

- ⇒ 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 previously
- ⇒ You have at least 1 Trust entered onto your database

Preparation for Level 1, Session 4

- ⇒ 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