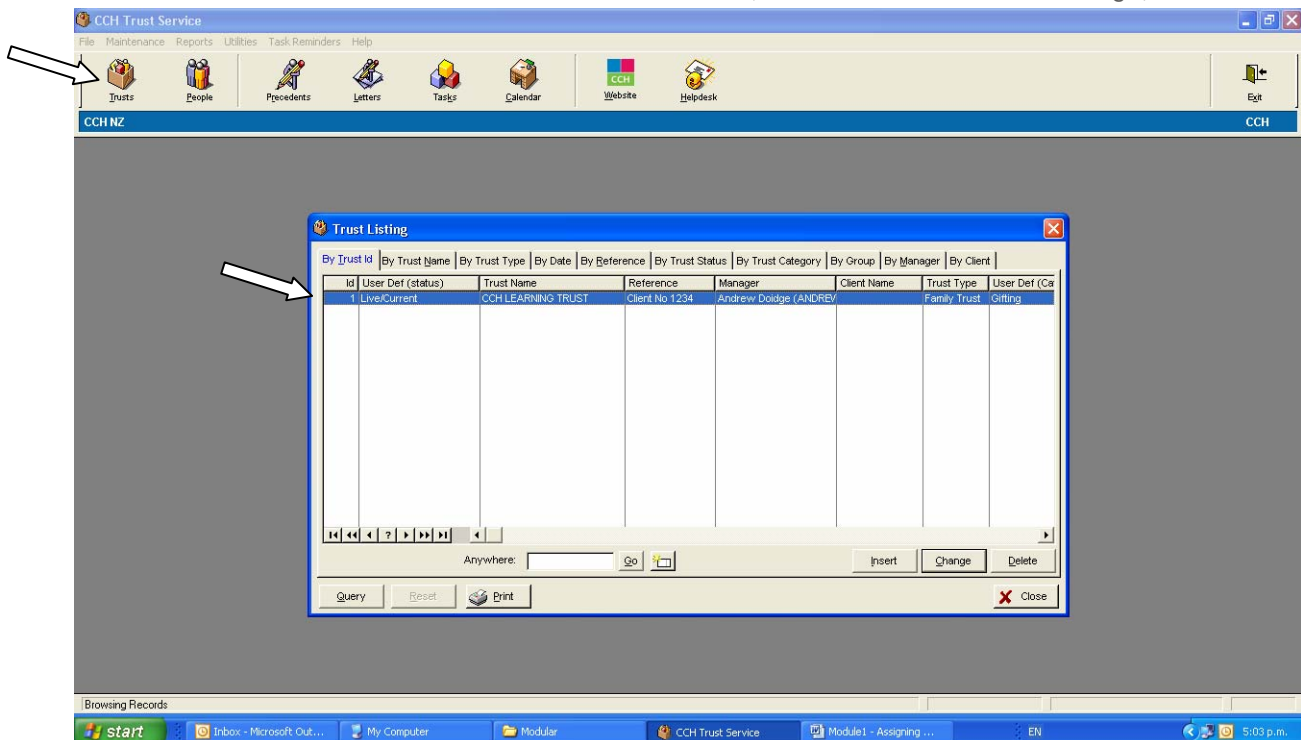


# TRUST SERVICE TRAINING - LEVEL 1

## SESSION 4.2

### ADDING A TASK TO THE CALENDAR

Select Trust Shortcut, then select Trust from List (double click or select Change)



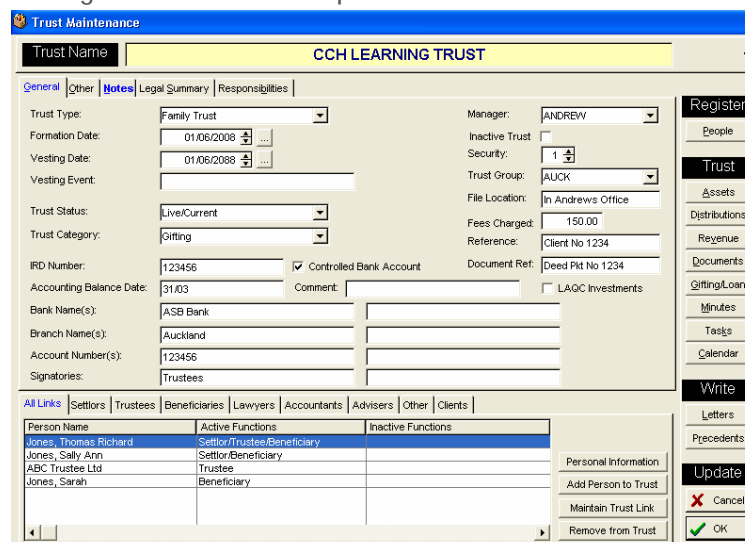
The screenshot shows the CCH Trust Service application interface. The top toolbar contains icons for Tru**sts**, People, Precedents, Letters, Tasks, Calendar, Website, and Helpdesk. The 'Trust Listing' window is open, displaying a table with the following data:

Id	User Def (status)	Trust Name	Reference	Manager	Client Name	Trust Type	User Def (Ca
1	Live/Current	CCH LEARNING TRUST	Client No 1234	Andrew Dougla (ANDREW		Family Trust	Gifting

At the bottom of the window, there are buttons for 'Query', 'Reset', 'Print', 'Insert', 'Change', 'Delete', and 'Close'. The Windows taskbar at the bottom shows the 'start' button, 'Inbox - Microsoft Out...', 'My Computer', 'Modular', 'CCH Trust Service', and 'Module1 - Assigning ...'.

You can access the Calendar from the top toolbar, however, the most effective route is to go via the Trust as shown above

Select Calendar from Right Hand Menu to open the Calendar

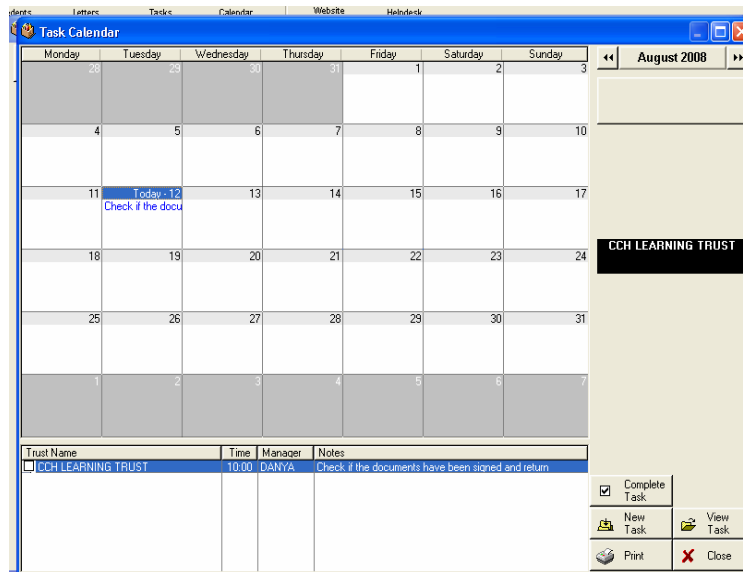


The screenshot shows the 'Trust Maintenance' window for 'CCH LEARNING TRUST'. The window is divided into several sections:

- Trust Name:** CCH LEARNING TRUST
- General:** Trust Type: Family Trust; Formation Date: 01/06/2008; Vesting Date: 01/06/2008; Trust Status: Live/Current; Trust Category: Gifting.
- Manager:** ANDREW
- Client:** Client No 1234
- IRD Number:** 123456
- Accounting Balance Date:** 31/03
- Bank Name(s):** ASB Bank
- Branch Name(s):** Auckland
- Account Number(s):** 123456
- Signatories:** Trustees

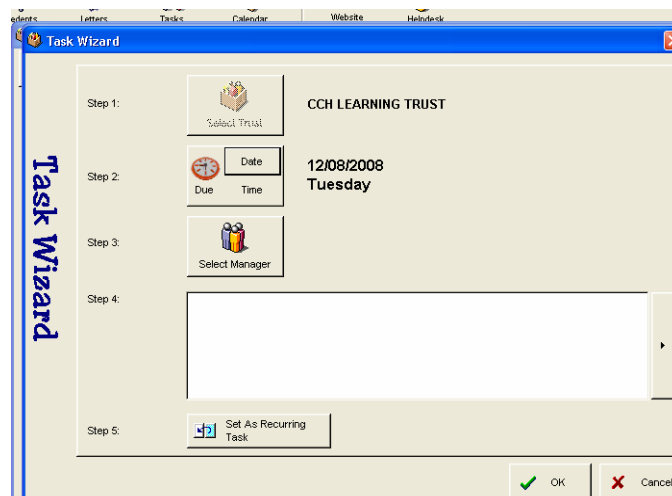
The right-hand menu contains the following options: Register, People, Trust, Assets, Distributions, Revenue, Documents, Gifting/Loan, Minutes, Tasks, **Calendar** (indicated by an arrow), Write, Letters, Precedents, Update, Cancel, and OK.

This opens the Task Calendar screen.



This screen includes a Task List at the bottom which shows tasks for the selected day.

Select New Task (bottom left) to insert a new task



This screen looks a little different to the Task List version, however it contains exactly the same information

Type or Select the due date

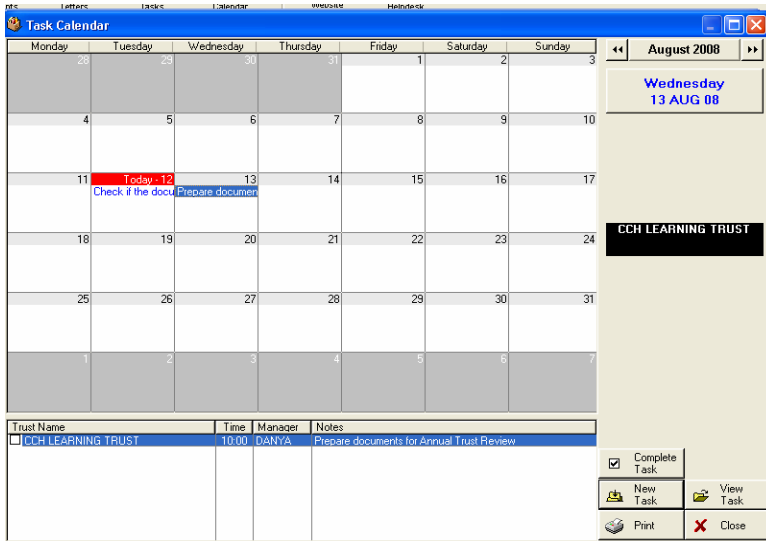
Type or Select a Time if required

Select the Manager of the Task (this will be the Manager of the Trust rather than the administrator who may actually complete the task)

Type the details of the Task

Click OK to Save

Your task is now shown on the Calendar



The screenshot shows a 'Task Calendar' window for August 2008. The calendar grid highlights Wednesday, August 13th as 'Today'. A task is scheduled for this date: 'Check if the documents are ready for review'. Below the calendar is a task list table.

Trust Name	Time	Manager	Notes
<input type="checkbox"/> CCH LEARNING TRUST	10:00	DANYA	Prepare documents for Annual Trust Review

On the right side of the calendar, there are navigation controls for 'August 2008', a date display for 'Wednesday 13 AUG 08', and a section for 'CCH LEARNING TRUST'. At the bottom right, there are buttons for 'Complete Task', 'New Task', 'View Task', 'Print', and 'Close'.

Tasks added to the Calendar will also show on the Task List

## ADDING A RECURRING TASK TO THE CALENDAR

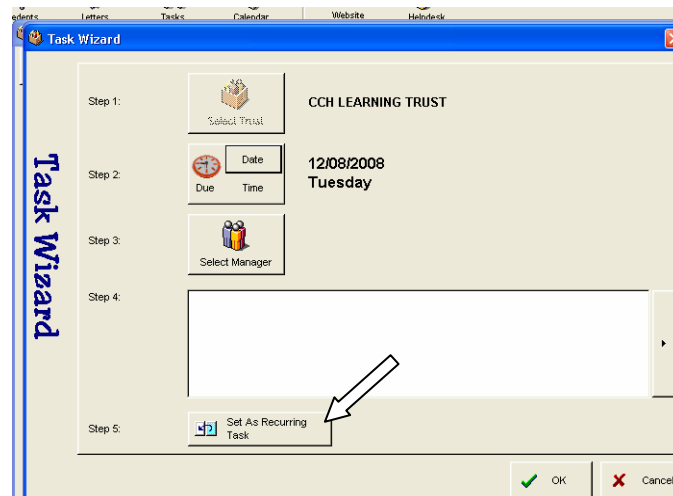
A recurring task can set to recur on a daily, weekly, monthly or annual basis.  
Tasks will only recur once they have been completed

Open the Calendar (as above)

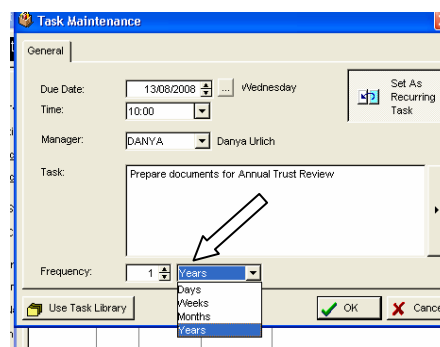
Select Insert

Add details of Task (as above)

Select Set as Recurring Task



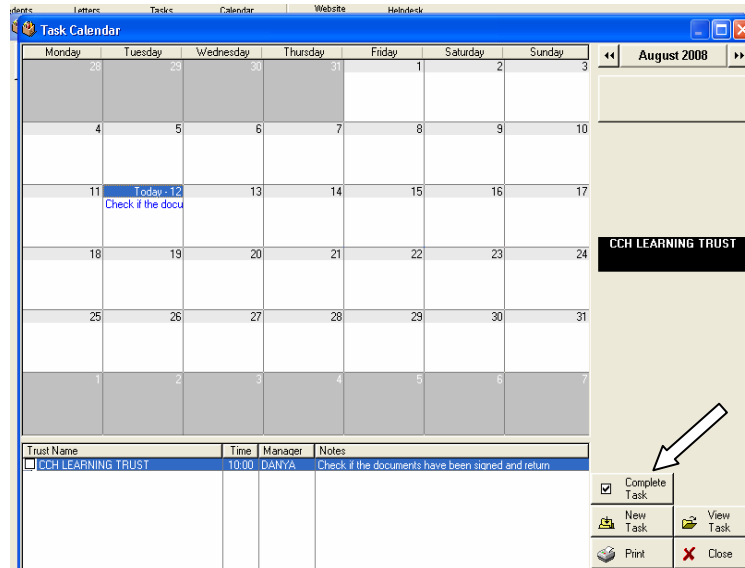
Type the number & select the unit (days, weeks, months or years) for the recurrence



Click OK to Save

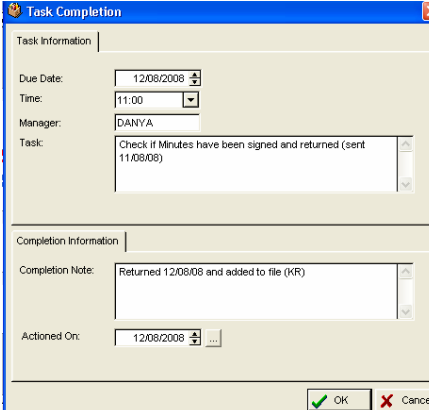
## COMPLETING A TASK

Open the Calendar (as above)



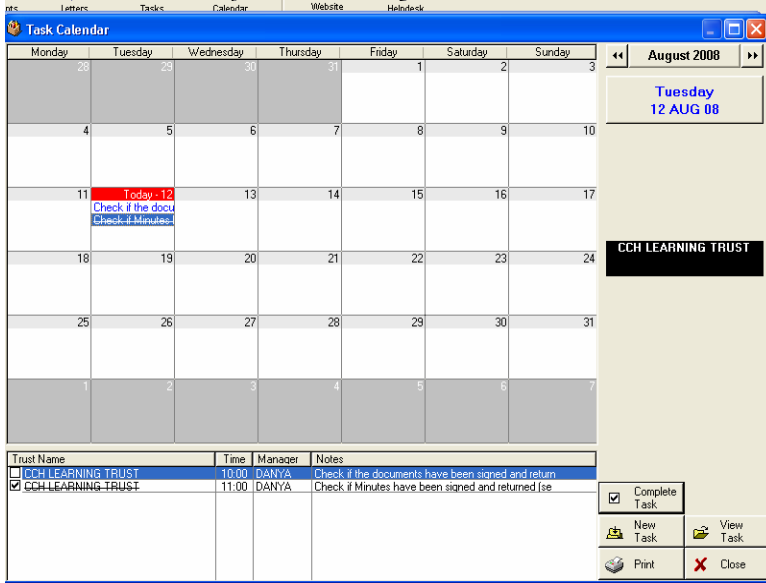
Highlight Task & select Complete Task

Type any Completion Notes & Type or Select Action On date



Click OK to Save

The task now shows as completed on the Calendar and the daily task list at the bottom of the screen.

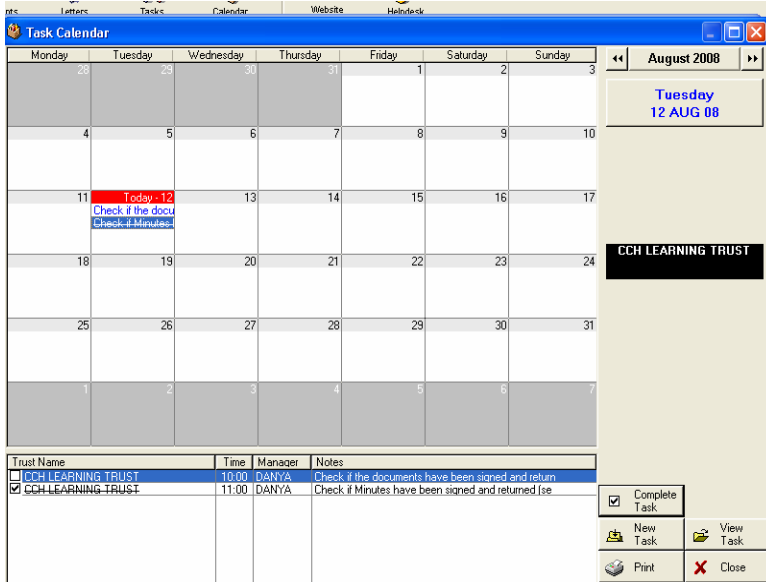


The screenshot shows the 'Task Calendar' application window. The calendar view displays a grid for August 2008. A task is highlighted on Tuesday, August 12th, with a red background and the text 'Today - 12' and 'Check if the docu' and 'Check if Minutes'. Below the calendar is a table with columns: Trust Name, Time, Manager, and Notes. The table contains two entries for 'CCH LEARNING TRUST'. The first entry is at 10:00 and the second is at 11:00, both managed by 'DANYA'. The 11:00 entry is checked. To the right of the calendar is a sidebar with the date 'Tuesday 12 AUG 08' and a section for 'CCH LEARNING TRUST'. At the bottom right, there are buttons for 'Complete Task', 'New Task', 'View Task', 'Print', and 'Close'.

Trust Name	Time	Manager	Notes
<input type="checkbox"/> CCH LEARNING TRUST	10:00	DANYA	Check if the documents have been signed and return
<input checked="" type="checkbox"/> CCH LEARNING TRUST	11:00	DANYA	Check if Minutes have been signed and returned [se

## DELETING A TASK

Highlight the task on the daily task list & use Delete on the keyboard



This screenshot is identical to the previous one, showing the 'Task Calendar' application window. The calendar view displays a grid for August 2008. A task is highlighted on Tuesday, August 12th, with a red background and the text 'Today - 12' and 'Check if the docu' and 'Check if Minutes'. Below the calendar is a table with columns: Trust Name, Time, Manager, and Notes. The table contains two entries for 'CCH LEARNING TRUST'. The first entry is at 10:00 and the second is at 11:00, both managed by 'DANYA'. The 11:00 entry is checked. To the right of the calendar is a sidebar with the date 'Tuesday 12 AUG 08' and a section for 'CCH LEARNING TRUST'. At the bottom right, there are buttons for 'Complete Task', 'New Task', 'View Task', 'Print', and 'Close'.

Trust Name	Time	Manager	Notes
<input type="checkbox"/> CCH LEARNING TRUST	10:00	DANYA	Check if the documents have been signed and return
<input checked="" type="checkbox"/> CCH LEARNING TRUST	11:00	DANYA	Check if Minutes have been signed and returned [se