

# TRUST SERVICE TRAINING - LEVEL 3

## SESSION 8

### OVERVIEW

In this session we will learn how to:-

- ⇒ Customise the Standard CCH Trust Service Templates
- ⇒ Create additional Templates
  - Using Standard Bookmarks
  - Using User Defined Bookmarks
- ⇒ Create Letters to Single Person in Trust
- ⇒ Create Letters to Multiple Person in Trust

### Prerequisites for Level 3, Session 8

- ⇒ The Trust Service Software is Installed at your office
- ⇒ You have the latest version, 4.2
- ⇒ You are familiar with the Trust Service Software, adding a Trust, maintaining records, creating documents from Standard Templates
- ⇒ You have a general understanding of the principles of Mail Merge

### Preparation for Level 3, Session 8

- ⇒ Print the Session Notes
- ⇒ You may also want to review the notes on Session 2, Creating Documents from Standard Templates.
- ⇒ 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