

Customising Basics and Customising Precedents - Existing and New

In this session we will learn how to:-

- Understand templates and merge fields
- Customise the Standard CCH Trust Service Templates
- Create additional Templates
 - Using Standard Bookmarks
 - Using User Defined Bookmarks
- Appendix: Working with the Style File
- Appendix: List of current basic bookmarks

Prerequisites for Session 8

- The Trust Service Software is Installed at your office
- You have the latest version, 4.3
- 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 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